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BREAKING THE CAREER BUBBLE

TODAY'S MR JOBS ARE EXPANDING TRADITIONAL ROLES

PLUS Indianapolis Museum of Art works to grow its audience

Critical thinking for researchers

Five behaviors to help MR evolve

ADVERTISING SECTION

15 Top Hispanic Research Companies

Quirk's Marketing Research Review
August 2017
Volume XXXI Number 8
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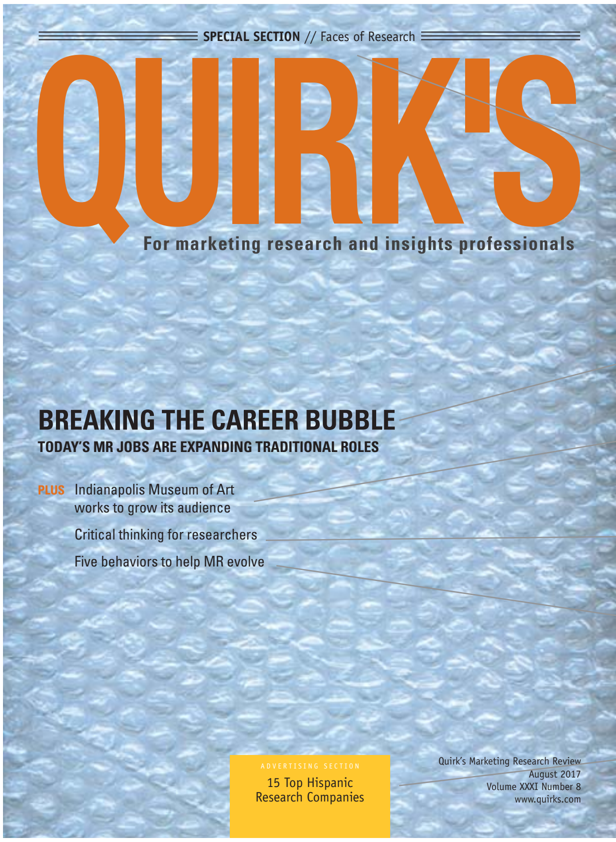

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SHOP

••• non-profits research

Looking for the donation sweet spot

Charities and nonprofits can increase engagement and revenue by setting suggested donation levels that are appropriate for their donor lists, according to research by the University at Buffalo School of Management. As reported by the University at Buffalo's Matthew Biddle and published in the *Journal of Marketing Research*, the research found that setting a low suggested amount increased the total number of donations. Conversely, setting a high default amount increased the average amount donors gave but resulted in fewer contributions overall.

"About three-quarters of charities do not use suggested amounts in their online solicitations and those that do, tend to set low amounts, often out of fear of backlash from their supporters," said Indranil Goswami, assistant professor of marketing in the UB School of Management, in Biddle's article. "However, our research shows high default amounts do not negatively impact donors' behavior or attitudes toward the charity or giving in general."

In a series of studies – including a university fundraising campaign sent to 7,800 past donors and a hypothetical online drive with nearly 3,500 participants – the researchers found a low suggested amount brought in more donors, regardless of the charity and the donors' age, gender or mood. "Participants who had not previously donated responded positively to lower defaults," Goswami said, "saying the recommended amount 'came from a trustworthy source' and 'felt like helpful guidance.'"

On the other hand, for organizations with a strong set of annual donors, asking for a higher contribution can influence donors to give a little more. "Those who can't commit that amount may choose not to donate but people who identify strongly with your organization's mission will rise to the challenge," Goswami said.

quirks.com/articles/2017/20170801.aspx

••• employment research

Workers split on benefits of automation

A survey by the American Staffing Association, Alexandria, Va., conducted online by Harris Poll, shows that nearly equal percentages of respondents say that automation (e.g., robots or artificial intelligence) will be a good or a bad thing for the future workforce.

Thirty-four percent of Americans say automation will be a positive development for the workforce in the next 10 years or more, compared to 31 percent who say it will be negative. Thirty-five percent are neutral on the matter or don't know. Eighty-three percent of Americans think that increased automation will revolutionize work and 82 percent say this transformation is inevitable.

A majority of respondents think that automation will fundamentally change the quantity (79 percent) and types (68 percent) of jobs available in the U.S., while 72 percent say its increased use will lead to higher unemployment. Nearly three-quarters (73 percent) do not believe that their work can be easily replaced by robots or artificial intelligence and 85 percent agree that the human factor outweighs any benefits from mechanizing their job. Ninety percent say that there are some tasks that automation will never be able to take over from humans.

By Joseph Rydholm, Quirk's Editor

Keeping up with the changes

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Joe Rydholm can be reached at joe@quirks.com

I've been thinking a lot about change lately. Not the kind left in your pocket at the end of the day; I'm talking about the change that makes things different from how they were before. It's been on my mind because we're working on the 2017 installment of our annual Corporate Researcher Report (CRR) and each year since 2014, when we began publishing the reports based on the findings from our annual survey of marketing researcher salaries and work lives, I've been amazed at how little some of the numbers have changed, especially the salary- and job satisfaction-related ones.

I guess I'm not sure what I've been expecting as far as change goes – a massive drop in salary levels, perhaps, or a decline in job satisfaction? But typically the most interesting parts of analyses of survey results are the outliers, the numbers that surprise – whether good or a bad (assuming they're not due to some kind of error). Absent those kinds of standout findings, I've always worried that the CRR articles on the results of our survey are too similar from year to year. That's one reason we've made a point of asking several open-ends on various timely topics, as a way to add some spice to the numbers while also giving a voice to the honest thoughts of our researcher readers. It's also why we plan to continue devoting a lot of space in the CRR to some of the topics and issues that seem likely to contribute to noticeable changes in the industry.

One of this year's areas of focus, for example, is quality. We have asked our content partners to write on topics related to quality based on data from the survey (including methodologies that deliver quality results; sample quality; and how automating aspects of the MR process can enhance quality) because in the end, quality – of information, of strategies and insights offered based on that information and of the methods used for data-gathering – is one deliverable that can set an organization's marketing research function apart from other internal departments battling for budget and recognition from the C-suite.

Where were the insights departments?

I wondered about a lack of recognition for MR as I read a recent *Wall Street Journal* article ("So long Hamburger Helper: America's venerable food brands are struggling") on how some of the big packaged foods companies have been caught flatfooted by the rise of consumer interest in so-called clean-label food products, those with ingredient lists that don't require a degree in food chemistry to decipher them. A natural first question is: Where were the insights departments at these companies during all of this? Were they aware of and tracking these societal shifts?

The article makes no mention of internal marketing research, either listened-to or ignored. My guess would be that trends were identified and brought to the attention of various executives over the years but then inertia and, in the case of Hamburger Helper, according to the article, robust profit margins probably got in the way of the companies making any meaningful, substantial changes in response to shifting consumer preferences.

Factors like inertia and safeguarding the bottom line are often out of your control but something that is in your control is quality. Hopefully the CRR will give you some useful strategies for keeping one step ahead of the changes. You'll find it included with our annual Researcher SourceBook, our directory of providers of marketing research products and services, which should land with a thump on your desks in September. (Of course, you can always access the online version of the Researcher SourceBook at Quirks.com.) The CRR will also be available in PDF form and we will distribute it at the 2018 Quirk's Events in Irvine, Calif., and Brooklyn, N.Y., and at other industry conferences throughout 2018. Please let us know what you think of it and how we can make it better serve your needs and interests.

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••• advice for researchers

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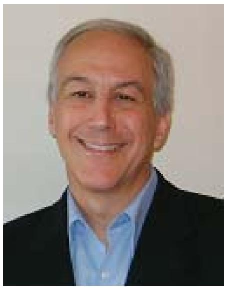

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How do I get more out of my tracking research?

Tracking monitors the heartbeat of your business! Unlike past sales, tracking is predictive, allowing time to address problems. In design, measures should always be linked to business action. Importantly, use real-time alerts to trigger prompt action. Remember to minimize burden, optimize engagement and build for mobile. Append transaction-level data or scoring to generate insights. Push reporting deep into the organization though control charts and visualizations. With additional sample, tracking designs can also inform marketing mix changes or address trending topics.

Cara Woodland
Global Voice of the Customer Manager,
Columbus McKinnon Corporation

What are some pros and cons of using digital ethnography over traditional ethnography?

We [Columbus McKinnon Corporation] have a challenge in gaining access to our end users' work environment, with safety concerns, remote locations and concern with competitive intelligence. Digital ethnography provides a way to access this without physically being present. It allows our end users to document their work environment in an acceptable way to their organization and provides us with a level of understanding that we wouldn't normally be able to receive when interviewing them. It also allows us to see details in spaces we normally wouldn't be allowed – or fit – in.

Paul Conner
Founder and CEO, Emotive Analytics
paul@emotiveanalytics.com
www.emotiveanalytics.com
314-752-0564

What are the best ways to measure subconscious (aka implicit or System 1) emotions that people have with various marketing assets?

There are several ways. First, define the level of emotionality you're interested in – dimensional (e.g., valence and arousal), primary emotions (e.g., happy, sad, angry) or discrete feelings (e.g., confident, secure, disappointed). Psychophysiological methods – e.g., facial EMG or coding, brain scanning or biometrics – work at the dimensional level but are less reliable beyond that, especially for discrete feelings. Implicit association measurement via priming techniques works at all levels, especially discrete feelings. Metaphor elicitation is another good approach, more qualitatively-based. If possible, use multiple methods to increase validation and to solidify insights.

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IN FOCUS

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

Q // Survey Monitor

••• technology research

Not much to talk about

Ownership, intent to buy remain low for digital home assistants

Though they are breaking new ground in many ways, digital home assistants (DHAs) such as Amazon Echo and Google Home are also leveraging consumers' proven comfort with using speech to operate digital devices. New research from GfK shows that 76 percent of U.S. consumers (ages 13 to 64) have used voice commands on any device. Within this group, 69 percent say they have used speech to operate a smartphone. Tablets (21 percent), car radios and navigation (20 percent), PCs (18 percent), and TV sets (14 percent) registered much lower levels.

Less than two years after introduction, DHAs have yet to make more than a small dent in the U.S. market, with just 11 percent of consumers saying they own either an Amazon Echo/Dot (10 percent) or Google Home (2 percent). And, among non-owners, intent to buy a DHA is low (just 3 percent are "very likely" to purchase one in the next year).

The findings come from GfK's Commanding Media report, one of an annual series of reports known as The Home Technology Monitor. The report shows that almost half (46 percent) of those who own DHAs say they use the devices at least regularly and two in 10 (19 percent) turn to them "all the time." Playing music is by far the most common application for the assistants, cited by two-thirds (63 percent) of DHA owners.

Top 10 Ways People are Using Digital Home Assistants

1. Play streamed or downloaded music
2. Ask a question
3. Get news/weather/traffic
4. Get sports news
5. Control lights/thermostat/fans
6. Check/revise calendar/to do lists
7. Play videos
8. Search for/play podcasts
9. Read/compose emails/texts
10. Order products from Amazon or elsewhere

"The use of voice opens up new relationships between consumers, device makers, voice service providers, and advertisers that will need to be carefully navigated," says David Tice, SVP Consulting at GfK. "With these devices integrated so closely into their lives, consumers will be especially sensitive to false steps – whether it be violating the privacy of conversations, prioritizing search results based on payments, promotion of certain shopping services above others or enabling intrusive advertising."

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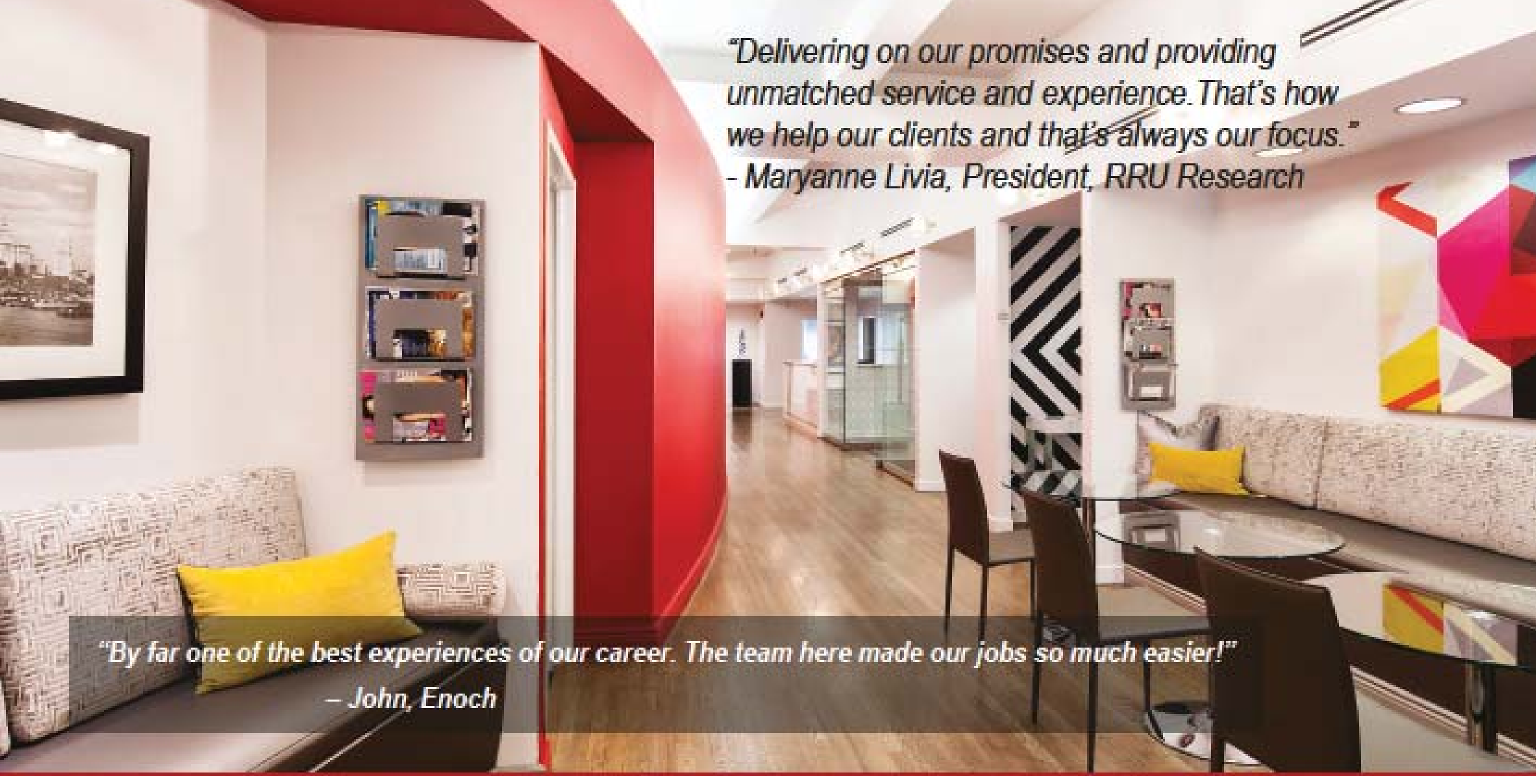

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– Marshall from Greenberg Strategy

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••• health care research

Trouble on tap

Water worries top-of-mind for Americans

Access to clean drinking water and the nation's water infrastructure are major concerns for Americans across the country, according to Perspectives on America's Water, a new study. A total of 6,699 American adults shared their views on water-related topics in this online study conducted on behalf of Nestlé Waters North America by research firm PSB in May.

Water is viewed as the most important natural resource in Americans' daily lives, more so even than clean air (87 percent compared to 81 percent). Yet 61 percent of American consumers and 66 percent of experts characterized water problems as a crisis or major issue for the United States.

The study found that two in three Americans (66 percent) believe their own community's clean drinking water is at risk, while 59 percent say a major overhaul of U.S. water infrastructure is needed to avoid that possibility. City-dwellers are especially likely to fear their community's clean drinking water is at risk (70 percent versus 63 percent in rural areas). There is almost universal agreement (96 percent) that if the United States does not proactively invest in the country's water infrastructure system now, it will end up costing more in the long run.

Many American consumers and experts question whether the tap water in their home (36 percent and 30 percent, respectively) and schools (40 percent for both) is clean and safe. Parents with school-aged children under the age of 18 are more likely to worry; 45 percent of this group question the safety of the tap water in their schools. Government officials polled worry the least, with only 16 percent who say they question the safety of water in their homes.

There is also concern among Americans that water supply issues will become more pressing within the next decade. Forty-two percent of Americans surveyed believe water will become less available in the next 10 years and two-thirds (66 percent) believe water crises will have widespread consequences for individuals, businesses and the United States overall.

Nearly three-quarters (71 percent) of respondents say climate change has had a great deal or somewhat of an impact on access to clean drinking water by reducing the overall amount (41 percent) and quality (38 percent) of water available. About half (51 percent) say the impact of climate change on access to clean drinking water will increase over the next 10 years, but improving infrastructure (59 percent) or developing innovations for purifying water (58 percent) could help mitigate this impact. Experts are especially likely to say climate change is impacting clean drinking water (76 percent) and are more likely than American consumers overall to say this impact will increase over the next 10 years (58 percent).

Americans surveyed support investment in infrastructure to address both the causes and effects of water-related issues. In terms of specific infrastructure improvements, Americans believe it is necessary to prioritize early detection systems that identify contamination in the water supply (64 percent), more efficient water collection and purification methods (52 percent) and infrastructure to increase water access, quality and capacity (48 percent).

To accomplish this, Americans expect cross-sector collaboration from government at all levels, as well as businesses and environmental organizations. American consumers expect local (71 percent), state (71 percent) and federal governments (65 percent) to play a role in ensuring people have access to clean drinking water, as well as consumers (39 percent) and businesses (35 percent). Experts are especially likely to see opportunity for consumers (45 percent) and businesses to be involved (40 percent).

PSB, on behalf of Nestlé Waters North America, conducted an online survey among 6,699 American adults in May 2017. The audiences included general population Americans (mapped to the U.S. Census on key demographics); an oversample of general population respondents in Arizona, California, Colorado, Florida, Maine, Massachusetts, Michigan, Missouri, New York, Oregon, Pennsylvania, South Carolina, Tennessee, Texas, Virginia, Washington, and West Virginia; opinion elites, health/environmentally-conscious consumers; government officials, academics, NGO employees, utility company business decision-makers and engineers.

••• higher-education

Why do students choose the major they do?

Study examines effects of showing future salaries

There are few questions as loaded as, "What are you majoring in?" Countless parents, even a president, have derided some major choices, most often for not being practical (translation: for leading to careers that don't pay much). As any parent of teenagers knows, such derision can backfire – leading a student straight into an impractical major. But it begs the question: Why do students choose the majors they do?

"It may seem evident that students choose a major based on a range of factors, including but not limited to earning potential," says Arizona State University Associate Professor of Economics Matthew Wiswall. "But the question is somewhat understudied."

How much does earning potential matter to a student's choice of major? What if the student is misinformed about actual earning potential – could accurate information change the student's mind? Those are questions that Wiswall and his coauthor, Basit Zafar at the Federal Reserve Bank of New York, answered in their paper, "Determinants of college major choice: identification using an information experiment," published in the *Review of Economic Studies*.

To answer their questions, Wiswall and Zafar set up an information experiment – a novel approach that would not just rely on observation to determine students' preference but ask the students. The researchers recruited a group of first-year undergraduate students, sophomores and juniors from New York University. The students were sent a survey with questions about their perceptions of earnings and ability relative to five major categories: business and economics, engineering and computer science, humanities and other social sciences, natural sciences and math, and never graduate/drop out.

First, the survey asked students how much they think a 30-year-old working full-time with a bachelor's degree in each of the five majors earns. "We have real data on earnings by major but students could be misinformed if they haven't seen the data themselves," Wiswall says. In many cases, students overestimated earnings, often by a lot. For example, students overestimated full-time earnings for female graduates in economics and business by 31.1 percent and male graduates in the same majors by 16.6 percent.

Next, the survey asked students how much they think they would earn working full-time at age 30 if they graduated with a bachelor's degree in each of the five majors. A student's answer to that question might be different than the first, Wiswall says, if the student sees herself as particularly exceptional (and likely to earn more than average) or not so great (and liable to make less). Given the high-ability sample of students taking the survey, it was not surprising that students predicted their future earnings would be higher than average.

Students' perceptions of their earning potential followed the same pattern as their thinking about how much people today earn in those different fields. "Students believe their earnings will be highest if they complete a major in the economics/business and engineering/computer science categories and lowest if they do not graduate or graduate in a humanities and arts field," Wiswall says.

After recording their answers to the two baseline questions, students saw actual earnings data by specialization. Then they were asked again about their outlook for their earning potential. The researchers' goal: to see if accurate earnings data would change students' outlook about their earning potential in a given major. It did. Students revised their forecast for future earnings with economics or business degrees downward by 12.12 percent on average, and upward by 33.42 percent on average for no degree.

Not only did correcting students' misinformation about earnings by specialization change their beliefs about their own earning potential but it also changed many students' minds about which major to choose. Two-thirds reported some likelihood that they would graduate with a different major than the one they identified at the beginning of the experiment. Some who had identified humanities/arts as a possible major at the outset switched to a higher-paying major. A substantial number said they were more likely than before to major in humanities or arts.

The study also reveals the extent to which earnings expectations and ability perceptions influence students' choice of major. It makes clear that while earnings expectations and ability perceptions both play a significant role in the selection of a major, they are not the only factors that matter – or even the most important factors. "Even with our rich data on beliefs across a variety of [monetary] and [non-monetary] aspects of majors, major choices in our results are still primarily the result of taste," Wiswall says.

Taste encompasses all the other factors that influence a students' decision. It explains why even when students have accurate earnings information, some still choose lower-paying majors over higher-paying majors. These influential taste factors might include parents' majors or other family influences, experiential influences before college, a student's competitiveness or appetite for risk or plans for life beyond career.

The understanding that earnings perception influences students' major choices, and that students do benefit from the accurate information, has important practical implications. For one, it suggests that school administrators and others could provide that accurate earnings information for students to help them make better-informed choices. "College major is a big decision, and an important one," Wiswall says, "especially given the rising cost of higher education. In that environment, it's hard to argue that providing misinformed people with accurate information isn't a good thing."

••• customer experience

Drowning in data, thirsty for insights

IT pros cite better data use as priority

While 88 percent of IT leaders believe their organization truly understands its customers, only 61 percent of consumers feel companies understand their needs, according to a study conducted by Talend, a Redwood City, Calif., software firm.

The study, which was conducted by Researchscape, reveals that despite a wealth of data available about customer behavior and purchasing choices, companies have a long way to go in terms of effectively using this data to better meet consumer expectations.

Sixty-three percent of IT respondents indicated that using data to better understand customers is a top business priority for 2017, with 80 percent of companies ranking it at an eight or above on a 10-point scale. Due to the strategic nature of customer-360 initiatives, many are being led by C-level executives: CEOs or COOs hold this responsibility at nearly half of participating companies (42 percent combined), followed by CIOs and CTOs (39 percent combined). Today's IT organizations also recognize the importance of putting customer data in the hands of more employees, with 80 percent of surveyed companies indicating they're making customer data accessible across multiple business units.

"Our survey shows most consumers are data driven, with 57 percent reporting they rely on data to inform buying decisions," says Ashley Stirrup, chief marketing officer, Talend. "While the majority of companies recognize the importance of data in driving company strategy, many are just scratching the surface when it comes to understanding the dramatic impact customer-360 initiatives can have on increasing their share-of-wallet and inspiring lasting customer loyalty."

Approximately 80 percent of IT respondents indicated their budgets have grown over the past five years. Under increasing pressure to improve the customer experience, many have invested that budget in a range of customer relationship management tools, including: live chat (66 percent); data visualization (60 percent); speech recognition (52 percent) and retargeting tools (58 percent).

Despite the seemingly heavy investment by IT in customer support tools, many businesses still do not systematically track basic customer feedback. Fifty percent or less of the surveyed companies are deploying elementary barometers of customer satisfaction, such as: online reviews (used by only 36 percent of respondents); social media sentiment (utilized by only 43 percent); and past purchase or communication preferences (employed by only 50 percent combined).

The consumer survey showed that online reviews have become the new word-of-mouth for many, with 40 percent indicating these forums have the greatest impact on large purchases – almost twice the weight of friend and family recommendations. Additionally, 57 percent of respondents listed "having a negative review unaddressed while continuing to receive offers for similar products" as the top reason they would break up with a brand. Other reasons cited by consumers for breaking up with a company include: if the company falls victim to a data breach (53 percent) and not providing live/real-time customer service support (42 percent).

Overall, the survey suggests there is still room for organizations to use data more effectively to better understand and address customer needs. The rewards for improvement may be compelling – industry research suggests businesses are losing $62 billion per year through poor customer service. As big data and cloud tools improve, customer acquisition and retention may become increasingly competitive. Companies can seize today's window of opportunity by optimizing customer management tools and data to keep pace with constantly evolving consumer needs, deliver top notch engagements and maintain a competitive edge.

IN FOCUS

Product and Service Update

••• millennials research

Lightspeed, VICE partner on Millennial insights platform

Includes post-Millennials

Warren, N.J., researcher Lightspeed has partnered with VICE Media, Brooklyn, N.Y., to introduce VICE Voices, a Millennial insights platform. The research panel and portal combines Lightspeed's recruitment, community management and survey design with VICE's content on youth culture, connecting brands with representative segments of Millennials and post-Millennials through mobile surveys, quick polls, online focus groups and video testimonials. VICE Voices will initially launch in the U.S., with further launches in additional markets expected to follow beginning later in 2017.
www.lightspeedresearch.com

quirks.com/articles/2017/20170804.aspx

••• eye-tracking

Tobii adds virtual reality to MR

Based on HTC Vive headset

Eye-tracking research solutions firm Tobii Pro, headquartered in Sweden, has launched Tobii Pro VR Integration, a solution for conducting eye-tracking research within immersive virtual environments (VR). The solution allows researchers to collect and record eye-tracking data from a VR environment and gain insights on human behavior. Based on the HTC Vive headset integrated with Tobii eye-tracking technology, the product comes with the Tobii Pro software development kit for research applications.
www.tobiipro.com

••• CX research

Qualtrics enhances CX platform

Adds diagnostics

Provo, Utah, software company Qualtrics has made enhancements to its customer experience (CX) management platform, Qualtrics Customer Experience. Enhancements include a diagnostic assessment and methodology to help companies improve their CX programs for better customer satisfaction results and higher returns on CX program investment.
www.qualtrics.com

••• LGBTQ research

Tracking study will report on LGBTQ population

Identify consumer, media trends

Pittsburgh-based researcher CivicScience has launched a tracking survey aimed at studying America's LGBTQ community. The research will combine daily tracking questions, ad hoc surveys and the firm's respondent database to: measure the LGBTQ population; identify consumer, media, lifestyle and wellness trends; and provide ongoing reports to corporate, nonprofit and civic leaders. Although the U.S. Census originally planned to introduce questions about sexual orientation and gender identity in the upcoming 2020 Census survey, the agency reversed course in March. Due to the relatively low incidence rate of LGBTQ people in the U.S. population and poor survey response rates, commercial market research data on these consumers are limited as well. The scale and anonymity of CivicScience's survey methodology is designed to overcome these challenges. CivicScience will also publish a biannual report on LGBTQ population growth and change.
civicscience.com

••• concept research

Get back quick insights on tested stimuli

(iM)mediate from iModerate

Denver-based insights agency iModerate has launched (iM)mediate, a research approach that allows clients to test stimuli like concepts, advertising, messaging and other streamlined

research objectives with targeted audiences and receive the necessary insights in a few days. For each piece of stimuli tested, clients will receive a First Impression Score, a quantitative indicator of respondent reactions, which iModerate then rounds out with qualitative feedback for greater depth.
www.imoderate.com

••• Briefly

■ Shelton, Conn., researcher SSI is offering organizations a way to test its B2B panel by allowing them to submit questions for its B2B All-Access Omnibus survey, a free survey it conducts monthly. Companies can provide one to three questions on a topic of their choice and then receive a data set which includes submitted questions, demographics and firmographics like company size, industry, role and level.
www.surveysampling.com

■ Dallas-based technology company UBMobile has launched its Gesture-Based Surveys platform, which leverages features on mobile devices like dragging, swiping, tapping and capturing images and video. The company says question types have also been reimagined and redesigned with the aim of making the survey experience more fun.
www.ubmobile.com

■ Santa Monica, Calif., digital media company mitú and Burbank, Calif., firm ThinkNow Research have launched the Bidimensional Identity Measure (BIM), a method for marketers to measure how multicultural audiences self-identify with their American and specific ethnic cultures. The BIM was born out of mitú's first empirical study, A New Scale to Measure Multigroup Ethnic and American Identity in the U.S., in partnership with ThinkNow Research.
www.wearemitu.com
www.thinknowresearch.com

■ New York-based digital consultancy Converseon has rolled out Conversus 4.0, a new version of its AI-based text analytics solution for social and related voice of the customer data. The solution is enabled in more than a dozen languages, including Mandarin, Japanese and Arabic and offers new capabilities like automated F1 scoring, target- and facet-level analysis and more.
www.converseon.com

■ New York research agency Kantar Millward Brown has partnered with San Francisco-based data and analytics company Samba TV to launch a measurement solution for television advertising effectiveness. The joint initiative matches Kantar Millward Brown's Ignite panel, which includes PC and mobile users, with Samba TV's smart TV and connected device households to create a single-source verified passive measurement of TV advertising.
www.millwardbrown.com
www.samba.tv

■ Sweden-based media measurement firm MMS has released its digital ad ratings service, which covers video advertisements on broadcasters' Web sites and apps viewed across PC, smartphone, tablet and smart TV. The data is delivered to Sweden's market daily via MMS's ad analytics Web application and gives a holistic view of ad campaign impressions, de-duplicated cross-device reach and rich target group definitions. The service is built on Nuremberg, Germany, researcher GfK's data integration and data science capabilities, building on a joint project that started after the two firms established a partnership in 2015.
mms.se

■ Perrysburg, Ohio, mystery shopping company IntelliShop has launched MysteryShopMe, a customer experience improvement service aimed at small business owners. The service allows businesses to set up a program and receive information about their customers' experiences within 48 to 72 hours of placing an order.
www.intelli-shop.com

■ U.K.-based research agency Mustard has introduced Pickles, a smartphone app for qualitative research that provides in-the-moment insights at the point of engagement, allowing clients to see and hear from customers in-context.
www.mustard-research.com

■ Customer data platform AgilOne, Sunnyvale, Calif., has launched a customer data and engagement hub, available on the Oracle Cloud Marketplace. The hub allows marketers to create a single customer profile, apply predictive intelligence to customer data and orchestrate omnichannel personalization delivered through Oracle Responsys, part of the Oracle Marketing Cloud.
www.agilone.com

■ Covington, Ky., artificial intelligence start-up Wyzerr has launched an online platform to create feedback surveys that feel like games. The surveys, which the company calls Smart Forms, can capture up to 25 questions in under 60 seconds.
wyzerr.com

■ Atlanta-based marketing technology company Gauge Insights has launched its mobile application, Gauge, enabling brands to create customized research campaigns to provide product feedback and customer rewards. The firm has partnered with Philadelphia-based research company Focus Pointe Global (FPG) to beta test the app, and Gauge's technology will help power the FPG Think Tank platform. Gauge Insights will leverage Focus Pointe Global's respondent panel to grow its user pool.
www.gaugeinsights.com

■ San Francisco-based marketing analytics company Jumpshot has made available a suite of products that provides marketers with data on search, browsing and purchase behaviors. New products include: Search Feed, which provides a view into daily searches and clicks consumers perform on search engines; Transaction Feed, which looks into large e-commerce sites to provide a composite of online purchase behavior; and Upstream Analytics Feed, which

gives insights into the domains and pages users visited multiple steps prior to reaching a Web site up to 21 days earlier.
www.jumpshot.com

■ St. Louis-based research agency Brädo Creative Insight has introduced its new Brädo Innovation Lab, a mobile prototyping suite equipped with 3-D printers, laser cutters, modeling software and prototyping tools for creating new product and packaging ideas. The Innovation Lab is part of the firm's new headquarters in downtown St. Louis, a space that also includes a full-service research facility and a digital lab.
brado.net

■ U.K.-based mobile survey solutions firm OnePoint Global has made available its survey app development code, allowing clients to own, create, launch and manage their own survey apps to the app stores.
www.onepointglobal.com

■ San Francisco-based survey technology company Survox is offering API integration with insights solution SurveyGizmo, enabling brand researchers currently using SurveyGizmo to use Survox's voice-based survey capability. Researchers can leverage Survox Services to provide fully-automated voice surveys or any of the Survox-equipped research call centers to conduct interviewer-led surveys. Data from all survey sources are populated into SurveyGizmo for analysis and reporting.
www.survoxinc.com

■ In San Francisco, measurement company Verto Analytics has launched Audience Profiles, a media measurement product targeted for U.S.- and Europe-based publishers. The product offers behavioral, demographic, device usage and competitive insights, allowing publishers to create audience profiles that monetize users via advertising.
www.vertoanalytics.com

■ Harpeth Marketing, Franklin, Tenn., has released an e-book, *How to Manage Sales in the Market Research Industry*, available for free on the firm's Web site.
www.harpethmarketing.com

■ U.K. behavioral research agency Watch Me Think is opening up its video search, edit and share platform to anyone who works with video, offering up to 10GB of storage and use of its video analytics platform for free. SearchEditShare.video allows researchers, planners, agencies and brands to gather in-the-moment consumer feedback.
watchmethink.in

■ Newton, Mass., software solutions company MarketSight has adopted R, an open-source language and environment for statistical computing and graphics, within its data reporting and visualization application. The integration expands the product's analytic capabilities, allowing users to run any type of R script and easily view results. New analytics features include linear regression and correlation, with additional features to be added during the next several months.
www.marketsight.com

■ Warren, N.J., researcher Lightspeed has launched LifePoints, a mobile engagement app that is fully integrated with Lightspeed's survey design and provides in-the-moment campaign tracking, geo-specific and behavioral monitoring, quick polls, consumption dairies, IHUTs and video ethnographies. LifePoints is available in Apple and Google Play stores in the U.S. and will launch in additional markets across 2017 and 2018.
www.lightspeedresearch.com

■ Nashville-based marketing firm Targoz Strategic Marketing has launched the Reading Pulse Survey, which provides book publishers, agents and sellers with a picture of readers and delivers data on what they read and how to influence them to buy.
www.targoz.com

■ Nielsen, New York, has introduced advertising measurement on YouTube's mobile app with Nielsen Digital Ad Ratings, expanding its current measurement coverage of YouTube ads on desktop and mobile Web browsers.
www.nielsen.com

■ In Wilton, Conn., researcher Toluna has reported that its QuickSurveys digital insight platform now allows clients to select from more than 200 hyper-targeted demographic and profile audiences, enabling them to reach their targeted audience without any manual intervention. Clients can also gather insights from their data by creating custom bands, complex and nested quotas and manage respondent sources.
www.toluna-group.com

■ Simmons Research, New York, has integrated RMT DriverTags into Holistic Psychographics, its system that measures consumer psychographic traits to explain why certain TV shows have high ratings and certain ads generate higher ROI. The integration also serves as the foundation for Predictive Consumer Insights, a consumer research and predictive insights solution that maximizes return on ad spend.
www.simmonsresearch.com

■ Online panel provider Branded Research, San Diego, has launched a new direct payment feature for U.S. panelists using Dwolla's white label API, providing participants with same-day payments after participating in online surveys.
brinc.co

■ Nielsen, New York, has introduced the Nielsen Connected System, a technology platform for FMCG and retail companies that includes data, analytics and role-based applications from Nielsen and a group of connected partners to assist in decision-making and achieving profitable growth.
www.nielsen.com

■ State College, Pa., behavior analytics firm VideoMining has introduced ShopperImpact@, a product that uses granular in-store behavior data and analytics at the retailer account level to enable shopper-centered practices in category management and shopper marketing.
www.videomining.com

■ Port Washington, N.Y., researcher The NPD Group has expanded its Retail Tracking Service to cover the U.S. team sports equipment market. Data will include the major categories of basketball, football, baseball, softball, soccer, hockey and field hockey, racquet sports, golf and lacrosse.
www.npd.com

QUANT + QUAL Good alone. Great together. — ADVERTORIAL

REDEFINING THE APPROACH TO CONCEPT DEVELOPMENT

Founders of revolutionary breath freshener discover “eye-opening” opportunities — and risks — prior to product launch

Brand-new Breath is a new liquid breath freshener developed by Breathology in partnership with researchers at a leading university. Uniquely, Brand-new Breath is packaged in individual servings and formulated to be swallowed. Prior to introducing it to the market, Breathology founders needed to understand how the product’s features resonated with consumers, and how it should be positioned.

Breathology partnered with Quester for concept and advertising development. A set of fact and promise statements was developed, and each interview focused on understanding the consumer’s individual perspective on benefits, usage occasions, problems, barriers, challenges and emotions as they related to these statements. Leveraging its proprietary research design and artificial intelligence moderator, Quester conducted over 700 online interviews incorporating both quantitative and qualitative questioning.

“Swish and swallow” concept put to the test

Quester’s quantitative and linguistic analysts identified the following key findings and leveraged them to build a breakthrough concept that focused on the problem/need, product features, benefits, personal advantage, and price/value:

Product is intriguing	Product feature causes caution	Key differentiator is elimination not masking	Portable convenience is intriguing
Marketing should be built around: **1** Fresh breath all day and **2** All-natural formula made with organic ingredients	Swallowing the product presents the biggest challenge: concept is unfamiliar. This prompted Breathology to add vitamins and promote health benefits of ingesting product	Consumers reacted positively to a product that doesn’t simply mask bad breath but eliminates it at the source	“On the go” elicits confidence in having truly fresh breath throughout the day, although some believe the packaging could be wasteful

ACCORDING TO BREATHOLOGY FOUNDER CHAD WEIGEL:

“This research fundamentally changed the way we are taking Brand-new Breath to market and opened our eyes to new risks and opportunities. From the insights Quester provided, we are able to have more substantiated conversations with prospective buyers and distributors about how our product will be successful in their market channels.”

For the complete case study, visit Quester.com/Breathology.pdf.

To learn more about Quester’s unique quant-plus-qual solution visit Quester.com.

QUESTER®

How to determine sample size in conjoint studies

| By Rajan Sambandam

snapshot

Rajan Sambandam explores practical approaches to estimating conjoint study sample size.

What is the right sample size for a conjoint analysis study? It's a simple, ubiquitous question that doesn't seem to have an easy answer. Bryan Orme (2010), president of Sawtooth Software, the maker of the most widely-used software for conjoint analysis, lists a variety of questions that could affect the answer. He recommends some general guidelines (such as having at least 300 respondents when possible) but does not provide a more specific answer. Given that, is it possible to come up with a general recommendation that can be easily applied by practitioners? Specifically, is it possible to develop a simple, practical recommendation that can be applied before knowing any details about the study? We think it is.

Let's start with what we normally do when estimating appropriate sample size in market research surveys. There are two common approaches to sample size estimation – based on a single number or based on the difference between numbers.

For a single number from a survey, we are usually interested in understanding the associated precision. Conventional margin of error calculations can estimate the error bound around a single proportion (the calculation for proportions is easier than that for means and hence more often used). Since a sample of size 400 has about +/- 5 percent margin of error, we can be confident that it can keep the error below +/- 5 percent. Our error tolerance and budget will decide if this is an appropriate sample size for a study.

Alternatively, we can think about the sample size that is likely to yield a significant difference between two numbers (say, proportions). An independent samples t-test is commonly used to understand if two proportions are different. As before, it can be reversed to determine the sample size needed for a given difference to be statistically significant. For example, to detect a difference of 7 percentage points, a sample size of about 400 is needed.

In practice, samples in the n = 400 range are often taken as an acceptable default, as error reduction begins diminishing beyond that. And of course, if subgroup analyses are required, overall sample size may need to be adjusted to compensate. The great advantage here is that these calculations are made without needing to consider the number or type of questions in a survey. So, sample size decisions can be usefully made ahead of time, rather than waiting for questionnaire finalization.

But conjoint analysis is not the same as asking simple, direct scaled questions in a survey. Let's consider what is different about the conjoint process, how it impacts sample size and if there's a way to determine it ahead of time.

Sample size in conjoint

For the purpose of this discussion let's assume we are talking about discrete choice, the most widely-used type of conjoint analysis. Respondents are repeatedly shown a few (say, three to five) products on a screen (described on multiple attributes) and asked to choose the

quirks.com/articles/2017/20170805.aspx

one they prefer. A typical conjoint exercise is considerably different from a simple, direct, scaled question. On each screen a respondent has to consider several attributes, usually involving a trade-off between benefits and costs and has to provide a response (and repeat several times). Many factors can vary between studies, such as the number of attributes and levels per attribute, number of products displayed per screen, number of screens per study and sample size. In developing the design for a study, all these factors have to be taken into account. How does sample size fit into this?

Traditionally conjoint designs (once finalized) are tested to estimate the standard errors that are likely to occur with the utility scores (which are the primary output metric). A standard convention is to ensure that all utility scores have standard errors of .05 or less (which translates to about +/- 10 percent error bound around utility scores). The test determines what sample size will provide the target standard error values. Beyond the fact that this can only be done with software when the design is finalized (and hence quite late) there are a couple of other problems. One is that the test is only an approximation and the other is that the utility scores are not the primary output metric of interest.

The actual output metrics that are of practical interest are utilities of attribute levels transformed into shares of products, specifically purchase likelihood scores (in the case of single product simulations) and shares of preference (in the case of multiple products). Products created in the conjoint simulator are often evaluated using these metrics to determine appropriate market actions. In the case of purchase likelihood scores, the manager may be interested in the uncertainty (error band) surrounding the score, while in the case of share of preference the interest may be in determining whether the shares of two products are significantly different.

Figure 1: Sample Size Needed for Specified (+/-) Error Band - One Product

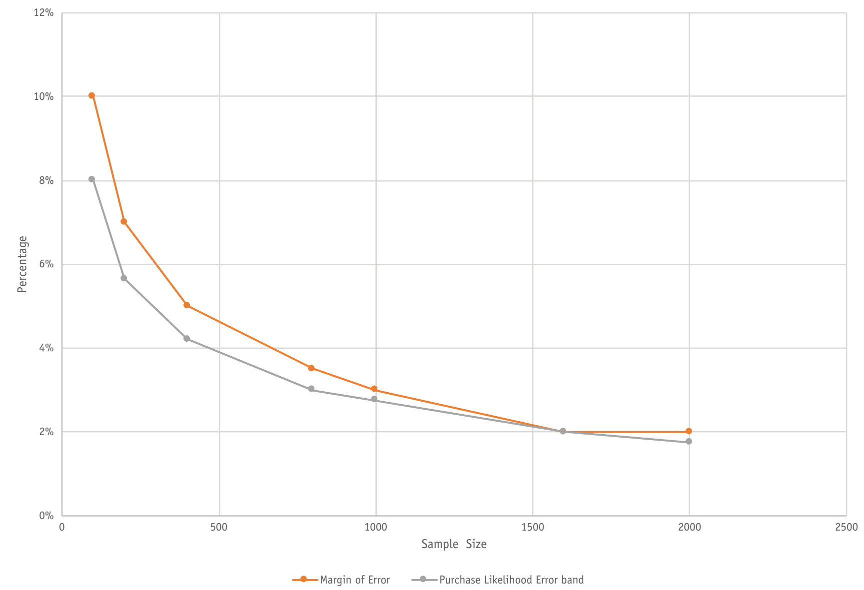
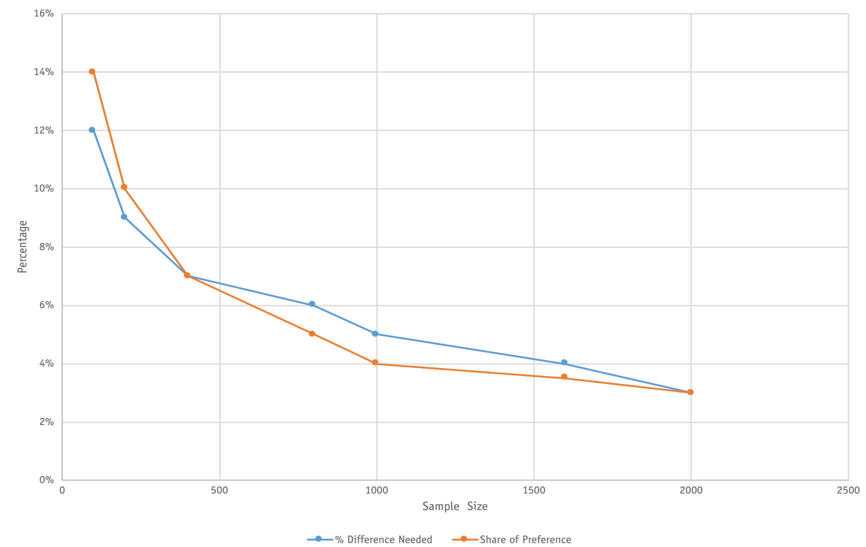


Figure 2: Sample Size Needed for Significant Share Difference - Two Products



This is, of course, very similar to the situation in regular surveys when determining sample size. So, the question is whether the same calculations used to determine sample size in regular surveys can be applied here. One way to answer this question is to do so empirically. That is, we can take an actual conjoint study, compute purchase likelihood, share of preference values and related error bounds, which can then be compared to the corresponding general survey calculations. Repeating this process over a variety of studies will allow us to generate enough data to determine if the sample size calculations applied to general survey data are applicable to conjoint results.

We tested 10 studies ranging in size from two to nine attributes, with two to 10 levels per attribute. The number of respondents per study varied from 402 to 2,552. Since studies with larger sample sizes can also be tested with randomly chosen subsets of data, we ultimately had 29 data points to study. For purchase likelihood, we developed a distribution of margin of error scores for each study, to identify the maximum error. For share of preference, we created a series of two product simulations (with shares in the 40-60 percent range) and tested the difference in share required for statistical significance at various sample sizes. (Technical note: This is the classical t-test rather than the Bayesian version where results may differ).

Charted results are shown in Figures 1 and 2.

When regression analysis is conducted predicting purchase likelihood and share of preference needed for significant difference, we find excellent models (with near perfect R^2 values). In both cases, the beta weight is about 0.80, implying that using conventional sample size calculations is a slightly more conservative approach.

The close correspondence between the sample size calculations for regular surveys and for conjoint shares makes sense given that the only variables used in these tests are the proportions (shares) and standard errors. Simply put, if a set of proportions and standard errors are available, their origins may not matter, only the outcome.

This raises a couple of questions.

Question 1: What about complexity? Earlier we said that the complexity of conjoint questions makes them different from direct survey questions. Hence even if sample size calculations from regular surveys apply to conjoint results, would they not vary based on study complexity? For example, would more-complex studies require larger sample sizes? Study complexity can be based on a variety of variables such as number of attributes, levels, concepts per screen, etc. We have not been able to test all of them, but by varying the number of attributes (< five and seven-to-nine) we found no difference (using four data points in each group). Further, in Figure 2 (which has 29 data points), the average scores at each sample size are displayed but the actual variation is quite minor, indicating that the study complexity does not have much of an impact on the sample size calculations. While we cannot say definitively that complexity does not impact sample size consideration, for most practical conjoint studies it would appear that complexity should not be a factor. But when studies have abnormalities in design (say, 12 levels for an attribute), it might be useful to consider increasing the sample size.

Question 2: Can I use fewer choice tasks? This is a common question that comes up as the design is being finalized and is generally triggered by the prospect of an overly long questionnaire. The subtext here is that this is to be done without increasing sample size for the study. We analyzed two studies by comparing results from the full set of choice tasks with that from a half set of randomly chosen choice tasks. As expected, margin of error increases (for purchase likelihood) while the ability to detect significant difference decreases (for share of preference). So there is a clear sacrifice that is made when fewer choice tasks are used.

Johnson and Orme (1996), show that the number of choice tasks and sample size can be traded off. Orme (2010) considers two common forms of survey error and suggests that sampling error is based on sample size and measurement error is based (mainly) on number of choice tasks. Hence the implication is that total survey error can be managed by trading off between the two types of error. For practical purposes, one way to think about this is in terms of sample availability. When sample is cheap and plentiful (e.g., B2C), perhaps a compromise can be made in terms of fewer choice tasks and more sample when questionnaires get too long. When sample is expensive and limited (e.g., B2B), the opposite approach may work better.

Can be easily calculated

Conjoint studies go through various stages of design and iteration. How do we determine appropriate sample size before we know anything at all about the design? The simplest recommendation based on outcome metrics of practical interest is to use conventional margin of error and significance testing calculations as guidelines. These are well-known and widely-used heuristics that can be easily calculated and appear to be somewhat conservative. If there is a sense that the study will have abnormal complexity, it may be prudent to increase the sample size beyond these guidelines.

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••• research careers

Breaking the career bubble

Today's MR jobs are expanding traditional roles

| By Kathryn Korostoff

snapshot

Kathryn Korostoff looks at trends for marketing research and consumer insights career planning.

quirks.com/articles/2017/20170806.aspx

Career path options for marketing research and customer insights professionals have changed dramatically in the past three years and they are still evolving. If you haven't taken a close look lately, your career-planning ideas may need a refresh. You may be making erroneous assumptions about skill or credential requirements. You may have outdated perceptions of job titles and volumes of openings – and of who else is competing for these same positions.

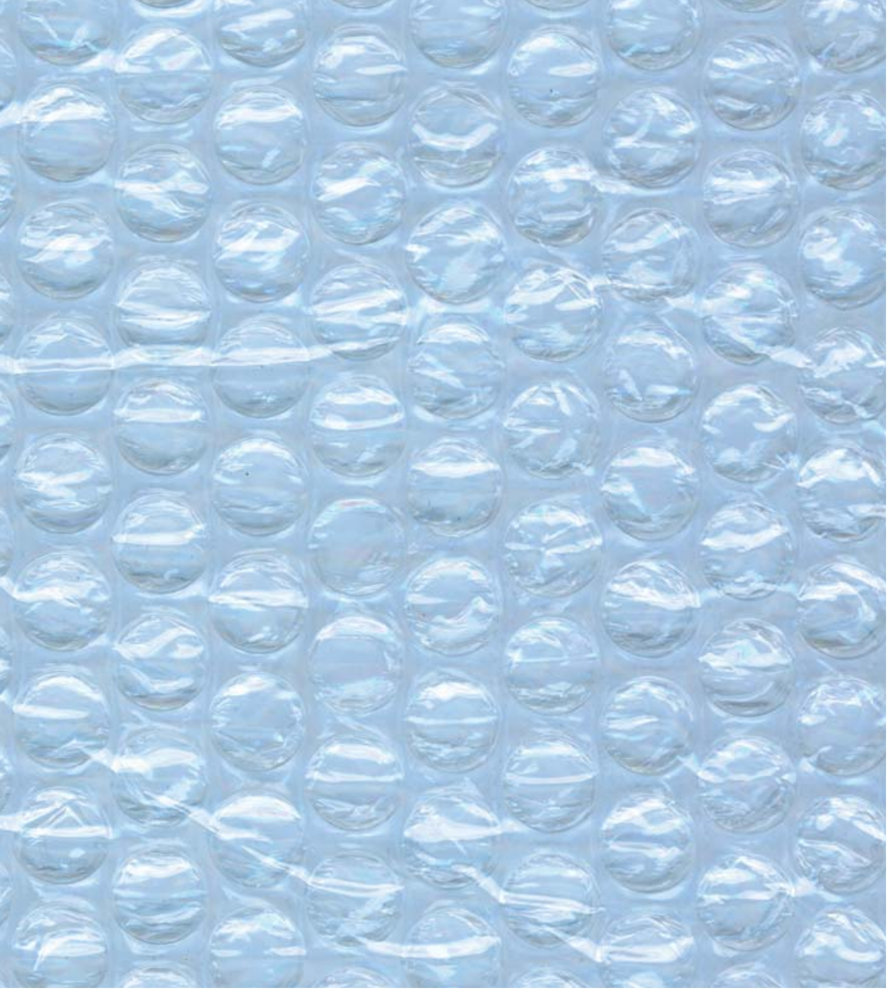
So, what is the state of career-planning for insights professionals, circa 2017? What are the most in-demand skills? What are the current job titles and in what relative volume do they exist? This article summarizes my research into these questions, drawing on analysis of over 30,000 job postings from Indeed.com and LinkedIn.

Skill set was standardized

If you've been in the insights profession for more than 10 years, you remember a time when the skill set – while certainly not trivial – was standardized around focus groups, in-depth interviews and surveys. If you had some solid quant or qual skills, you were qualified for many job openings. If you had both quant and qual credentials, you were golden.

In 2017, things are much more complex. Two major factors have driven this complexity.

The explosion in market research-related data tools, sources and methods and the corresponding increase in demand for people who have mastered them. Today, discovering and measuring customer attitudes and behaviors can be done using more than 20 major methods and literally over 100 tools. It is not possible to be an expert in everything anymore. The good news: There are a lot of opportunities for specialists, especially those who master new methods and tools. There's still opportunity for generalists too but to pursue a generalist role in 2017 and beyond, the successful candidate needs to be methodology- and



data source-agnostic. And in 2017, you can't credibly claim to be a data-agnostic advisor if the only methods you recommend are focus groups, interviews and surveys. You will need to be able to advise when to use those methods and when to use options that leverage in-house data sources (customer databases, e-commerce databases, etc.).

The evaporation of traditional boundaries between various data-based corporate functions. Previously siloed, "marketing research," "customer analytics," "business intelligence," "Web analytics," "competitive analysis" and other groups are being reorganized or otherwise better integrated. This opens some new career path options, where you will likely be facing some new competition (colleagues who may know more about Python and Tableau and less about applications are a common example).

In Table 1 I list the top 20 skill requirements for marketing research and customer insights-related professionals (see sidebar for notes on methodology). In analyzing the top 20, some themes become apparent:

Intelligence is hot. There are many job openings requiring skills related to business or market intelligence. Indeed, the debate many people have had about "research" versus "insights" seems rather trivial when we consider the enormous employer demand for "intelligence."

There are a lot of specialties. Thus, many skills did not make the top 20. Does that mean they are unimportant? No; just that skill requirements are very fragmented. For example, "secondary research" had fewer mentions than the items in the top 20 – but still had >400 job-posting mentions and thus is clearly a skill that will resonate with some employers. Same for "shopper insights" – an obviously important area of specialization. Related to the rise of specialties is the broad use of very precise skills across job postings. For example, "focus group" outpaced "qualitative research." And "R" outpaced "predictive analytics" (for which R is commonly used).

Quant is hot. Many top skills are quantitative. There is no denying that this is the case. It appears that many qualitative methods are not as widely specified in job postings, although they can obviously apply. For example, a top 20 skill is "user experience" – which factually often does use qualitative research methods. Thus, a qualitative researcher may find more opportunities for career advancement by making a clear connection between their methodology expertise and how it applies to more commonly specified specialties such as "user experience."

Table 1: The Top 20 Skill Requirements for Marketing Research and Customer Insights-Related Professionals

Big Data	**Top 10 Skills** mentioned in May 2017 job postings (sorted alphabetically)
Business Intelligence	
Data Analysis	
Data Visualization	
Market Intelligence	
Market Research	
Questionnaire/Survey Research	
R Statistics	
Strategic Marketing	
User Experience (UX)	
Behavioral Science/Behavioral Economics	**Next 10 Skills** mentioned in May 2017 job postings (sorted alphabetically)
Customer Experience (CX)	
Customer/Consumer Insights	
Focus Groups	
Marketing Research	
Predictive Analytics	
Quantitative Research	
SPSS	
Strategic Insights	
VOC	

Even niche skills have many openings. A few skills that did not even make it close to the top 20 still had over 100 postings as of May 2017. Examples: ethnography/ethnographer – approximately 120 postings; category insights (often associated with, but different from, shopper insights) – approximately 130 postings; competitive intelligence – just over 100 postings.

As you consider the top 20 skills in Table 1, please note the following:

- Some skills mentioned in job postings read like job titles; the two obviously can overlap.
- Some skills overlap. I consolidated patently equivalent skills but those that I judged as different enough (based on frequency of separate mentions) are in the table even though there is obviously some overlap. For example, there are many openings that require "R or SPSS"; thus "R statistics" and "SPSS" sometimes overlap, but both are included in Table 1 because they also often exist separately.
- Some skills are very broad ("market research"), others are very precise ("R statistics"). That's simply a reflection of how job postings are written.
- Because of month-to-month fluctuations and job posting overlaps (between LinkedIn and Indeed.com), it would be misleading to rank order the top skills from 1 to 20. Instead, I divide them into two categories: top 10 (sorted alphabetically) and next 10 (sorted alphabetically).
- Some popular skills are rather generic and nearly universal, so including them in the table would diminish other items. Nearly universal skills excluded from the top 20: analysis (analytic thinking/analytical thinker/related variations); written and verbal communications; project management (and variations related to budget and schedule planning); presenting (and variations related to presentation skills, presenting to executive audiences and presenting for impact); and customer loyalty (which has the added problem of being used to mean at least two different things).

Methodology notes

- Job postings from both Indeed.com and LinkedIn were used. Because of month-to-month fluctuations and observations about job-posting overlap, I'm reporting relative volume, not absolute numbers.

- After considering data source options, I decided to focus on current job postings: thus, the research shared in this article is based on analysis of over 30,000 job postings.

- To avoid being biased by specific job titles, I searched using phrases such as "research," "insights" and "analysis" related to: broad categories such as "market research," "customer insights," "customer/consumer attitudes," "customer/consumer behavior" and similar; discovering, measuring, predicting or experimenting with customer attitudes or behaviors; and application categories to capture job postings related to common research applications such as brand loyalty, pricing research, product concept testing, segmentation, etc.

- Data was gathered in May 2017. I had previously gathered higher-level counts but the May 2017 effort was the first in-depth data collection. I plan to do another round at a six-month interval.

- If anyone is interested in collaborating on this research, please get in touch.

Don't use 'market research' or 'customer insights'

Defining the career category quickly led me to realize: There are many positions posted that specify requirements that are relevant, yet the job titles don't use the phrases "market research" or "customer insights." Two examples:

A job posting seeking candidates with expertise in "measuring brand perceptions" and "social media research" had the title Brand Manager. Thus "marketing researchers" seeking career advancement might consider brand manager as one of their options: it leverages existing skills and, with a bit of a logical skill extension, may be a viable path.

"Business intelligence" job postings often specify classic market research skills. Thus, for example, someone seeking a career path that specializes in using research to inform product development/product roadmap strategy may find their next great job is in business intelligence.

Consider the following description from a June 2017 job posting. What title do you think it may have had?

The [job title] will turn data into information, information into insight and insight into business decisions. This role will conduct full lifecycle activities to include requirements analysis and design, develop analysis and reporting capabilities. The [job title] will discover and curate new and existing data sources to create solutions for the business. This is a key position which helps bring data to life. The [job title] will be responsible for querying and analyzing large sets of structured and unstructured data and developing solutions from this data, including ad hoc analysis.

The title? Data Analyst. Just that.

Try this one. What do you think the job title is?

Under minimal supervision, plans and conducts user research activities (e.g., usability testing, online surveys, interviews, contextual inquiry and focus groups) and translates findings into actionable customer insights that inform product development and optimization. This includes active involvement in the entire product development process, including identifying customer needs, ideation, testing and ongoing optimization.

Can you guess? User Experience Researcher.

And lastly:

Provides support through research, customer insights and analysis of the company's markets, competition, customers and end users. Analyzes the competitive environment, customer insights, future trends, product usage and makes recommendations based on findings. Provides updates to inform product/solution design, marketing and business strategy.

Any guesses? Senior Advisor, Market Intelligence.

There are many job openings – and hot career paths – that leverage marketing research skills but they have new (and diverse) job titles. The core phrases in Table 2 represent the top 15 phrases. The challenge is that they

Table 2: Job Title Combinations

Modifier	Core Phrase	Modifier
Junior	Brand	Analyst
Principal	Business Intelligence	Architect
Senior	Competitive	Assistant
	Consumer Insights	Associate
	Consumer Experience/CX	Consultant
	Customer Insights	Designer
	Market Intelligence	Developer
	Market Research	Director
	Marketing	Lead
	Marketing Analytics	Manager
	Product	Researcher
	Quantitative Research	Specialist
	Shopper Insights	VP
	Strategy	
	User Experience/UX	

are modified in very diverse ways. There are openings for Junior Brand Analyst and for Brand Managers that have job requirements that intersect heavily with those of many marketing research and consumer insights professionals. Consider it a slot-machine approach to job titles: Pull the lever and see what comes up! (Note: The items are sorted alphabetically, not by volume of job postings.)

Take a fresh look

Anyone who cares about advancing their career (or the career of someone else) in this space needs to take a fresh look: What are the current career path options? What are the skill requirements?

Based on this research, I see some great news: There are many opportunities out there. Still, to successfully pursue many of them, you need to be clear about which ones you want – you may need to (perhaps just lightly) update your skills, credentials and network to get there.

Some final thoughts:

You can't do it all. You will have to make a choice: Do you want to be a generalist or a specialist? Which would you rather be? Or do you foresee an evolution – perhaps starting in one role and evolving to another?

Don't get hung up on language – especially "research" versus "insights" versus "intelligence" – when looking for job postings. Titles can be very misleading. Searching for skills may be a better way to find openings that align with your credentials and interests.

Understand that traditional boundaries are blurring, especially those between market research, business intelligence and customer analytics. You next great job opportunity may be in a new department or at least a differently-integrated one.

Be ready to brag. As a professional researcher, you have awesome skills that are needed in the new blended world of all things data. For example, did you know there is widespread angst about the lack of ROI for many big data projects? And that it is often attributed to lack of clarity around project goals? That is a classic client management skill – and one many professional marketing research and customer insights professionals have mastered.

I hope this research helps you to refresh your career assumptions.

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case study

snapshot

The Indianapolis Museum of Art sought growth through a deeper understanding of its role in visitors' lives.

••• innovation research

Moving beyond the functional

How an art museum used the business concept of "jobs to be done" to segment and expand its audience.

| By Ron Halverson and Mindy Cultra

It's no secret that museum attendance in the U.S. is in decline among everyone but the 65+ set. People are busier than ever and competition for their free time is encroaching from all sides, whether it's other cultural venues, alternative out-of-home activities or simply the allure of staying home and binging on Netflix. How does a museum remain relevant – and grow – in today's distraction-filled digital age? The Indianapolis Museum of Art (IMA) took on this vexing question in a unique way: by hiring a research agency to conduct a museum study using a methodology it typically applies to consumer brands. That agency was Chicago-based Halverson Group and that methodology is called Jobs to Be Won.

Instead of taking the familiar path of audience research – focusing, for example, on member and visitor perceptions of cultural institutions – Halverson Group broadened the IMA's competitive set beyond other cultural institutions, focusing on all the life situations that motivate people to seek leisure activities of any kind. This

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is because a key tenet of Jobs to Be Won is to break through typical category walls and put one's organization into the shoes of people navigating their busy, complex lives. The approach is to ask: What jobs do people need to get done in their lives and how can my product or service get "hired" for these jobs? Derived through survey design, a job to be won is a job that is winnable, viable and valuable enough for an organization to pursue for growth. And, in many cases, it makes sense to go after more than just one job.

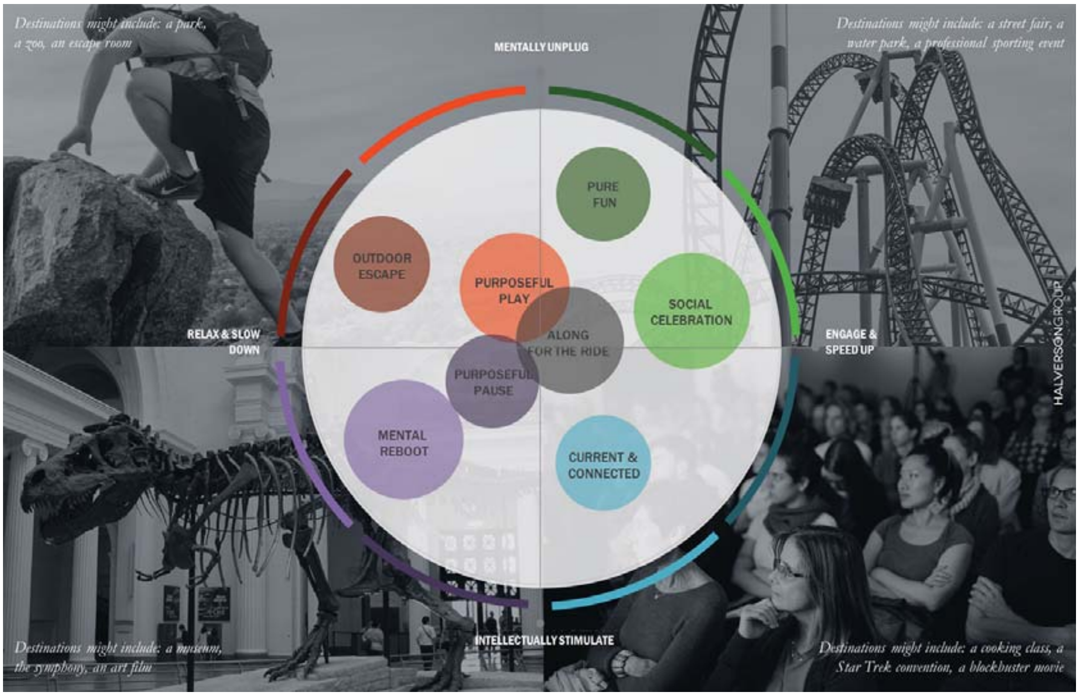

Figure 1: Research helped boil down hundreds of motivations to eight core jobs.

It's important to note that the hires people make to fulfill the jobs in their lives are not purely functional – they are rooted in deeper motivations. For example, we don't hire lawn mowers to cut grass; instead, we hire them to keep up with the Joneses or take care of our homes. This emphasis on motivations is essential because while people often change the solutions to the jobs they are seeking to get done (for example, they can fire their lawn mower and hire a service to cut their grass), their original motivations remain consistent. Viewing their products or services through a user's motivational lens can help businesses implement smarter and more enduring innovations, as well as develop more relevant marketing strategies.

Energize and direct

So, to reiterate: jobs are the motivations that energize and direct people's behaviors in the context of the situations in their lives. Now let's bring it back to the art museum. What jobs might people hire an art museum do for them? Remember, it's not "show them art" – that's a function. (As we established above with that ill-fated lawn mower, functional solutions do not have the staying power of those that tap into people's deeper moods and emotions.) What motivation-based job(s) could an art museum do for visitors? To thrive in today's world, the IMA needed to find out.

The first step in the study was to identify the broader jobs of leisure. What are people hiring leisure activities to do for them? Next, Halverson overlaid these jobs on the IMA's current and future states. Was the IMA being hired to do people's leisure jobs as often as it could be? What jobs was the IMA doing well (and which could it do even better)? Importantly, what jobs was the IMA fulfilling for current IMA members (key to not alienating a small but powerful segment)? Finally, what jobs could it go after to increase its audience base (that is, from what other leisure activities that do the same job could the IMA steal visits)? The study for the IMA led to just these answers.

Act in certain ways

Decisions about leisure activities are, for the most part, based on our everyday situations and the mood state we're in, which motivate us to act in certain ways. Just as we may hire a lawn mower (yes, that lawn mower) to help us in our quest to be upstanding property owners, we hire activities and destinations to do jobs for us in a variety of life circumstances – we have kids to entertain, we want to breathe fresh, clean air after a long week at work or we want to learn something new.

Researchers at Halverson Group surveyed more than 1,000 people in the Indianapolis area and adjacent states

The eight Jobs of Leisure

Outdoor Escape: Connect with the outdoors, find a change of scenery, move your body while relaxing your mind in a slow-paced natural environment.

Purposeful Play: Be playful while expanding one's mind. Do something that everyone can agree upon – allowing everyone to have fun, create fond memories and make an impression.

Purposeful Pause: Seek tranquility where it's possible to get away from it all, relax and unwind by immersing in a passion, observing beauty and appreciating culture and the arts.

Mental Reboot: Renew yourself and nurture the spirit by seeking individual time in a slow-paced environment to think and reflect, often involving outdoor activity.

Pure Fun: Indulge yourself and others with the lighter side of life, provoke laughter and fun without having to think too deeply.

Social Celebration: Energize and excite through an adventure that is out of the ordinary and indulgent in a way that inspires and feels young at heart in a fast-paced, social setting – focused on needs and desires, not obligations.

Along for the Ride: Do something for no good reason other than to be social and feel a sense of belonging, where you can almost picture one person asking "What do you want to do?" and another responding, "I don't know, what do you want to do?"

Current and Connected: Seek intellectual stimulation and personal challenge while staying up-to-date and learning about a subject to feel mature and wise, connecting with others and meeting new people.

to find out what situations lead them to seek leisure, what they hope to get out of it and the activities and destinations they turn to. The deeper motivations they uncovered ranged from "I want to feel sophisticated and refined" to "I want to create a tradition" to "I want to act like a kid again" and so on.

Through multivariate analyses, Halverson Group boiled down the hundreds of motivations to eight core jobs (Figure 1) that people could hire Indianapolis metro-area activities to do for them, from providing Pure Fun to a chance to go Along for the Ride. (See sidebar for a list of all eight jobs.) Halverson Group overlaid the various leisure activities in the Indianapolis area with the jobs these activities are most often hired to do. The research showed that, in a given year, Indianapolitans were most often seeking to hire activities for a Mental Reboot or a Social Celebration. And they were turning to everything from the zoo to the movies as solutions.

So where did the IMA fit in this picture? When it first hired Halverson Group, the IMA was firmly anchored in Purposeful Pause (and that was where its members liked it). But Purposeful Pause activities only made up 10 percent of all leisure activities that people hired in a year. What if, in addition to Purposeful Pause, the IMA could get itself hired for jobs sought after by a larger segment of Indianapolitans? Pushing into jobs that more people were looking to get done could attract a new audience. Purposeful Play, in which Indianapolis folks were spending 14 percent of their leisure time over the course of a year, was a viable place to grow – a job to be won for the IMA. Social Celebration, sought after 16 percent of the time, was worth IMA's consideration as well.

Understanding the jobs of leisure helped IMA explore viable territories for growth. The next step was to turn these jobs to be done into jobs to be won by the IMA through developing actionable strategies for growth.

Three-part growth strategy

Halverson Group used the Jobs of Leisure framework to help the IMA develop a three-part growth strategy.

1. **Protect and nurture its base.** As mentioned above, at the time Halverson Group was engaged by the IMA, the museum was firmly anchored in fulfilling the job of Purposeful Pause. By adding programming that would fulfill this job for members and current visitors in more life situations, the IMA would protect and grow its membership. To activate this strategy, the IMA reinvented and expanded its Summer and Winter Nights film series to steal even more visits from movie outings, which make up a major competitive share of the Purposeful Pause job.

2. **Lure new audiences.** Halverson Group also recommended that the IMA broaden programming to capture the more frequent Purposeful Play life situations to expand its audience, while staying true to its mission. From the research, the

IMA had learned that the interactive exhibits that were currently at the museum did not equal "play" in people's minds, so to steal visits from other providers of Purposeful Play, the museum had to lead with fun. Not long after Halverson Group completed its study with the IMA, the museum created a mini-golf course with holes designed by local artists, better fulfilling the job of Purposeful Play. This new initiative allowed the museum to keep its core audience and fulfill their desired job, while simultaneously stealing visits away from, for example, the zoo (another destination that fulfills Purposeful Play).

3. **Drive awareness and consideration.** The third recommendation was to strategically recruit the broader community to the IMA through special seasonal events anchored by key holidays and social celebrations. These events would lead to dramatic increases in visits for non-core programming, while introducing the IMA to a vast new audience that was interested in fulfilling the jobs of Social Celebration and Pure Fun. This past winter, with its Winter Solstice celebration, the IMA edged in on the job of Social Celebration, competing with other destinations that attract families who want to unplug and appreciate the lighter side of life.

Grew by almost 70 percent

The larger point is, by understanding the jobs to be done in people's lives and strategically identifying which ones the IMA can get hired to do, the IMA is winning new jobs. Despite implementing an $18 admission charge (the museum was previously free), membership grew by almost 70 percent in one year. It's not surprising, then, that one of the biggest proponents of the Jobs to Be Won work is Charles Venable, the Indianapolis Museum of Art's CEO, who, after the research was completed, told the *Indianapolis Business Journal*, "We're looking at how to get people here who want large social gatherings – people interested in 'purposeful play.' That's going to require us to continue to push the envelope. We want to be going in that same direction while still doing enough of the traditional material so core audiences still feel it's the IMA they always loved."

Just as artists get more notice when they are willing to push boundaries, so are cultural institutions more likely to be given more consideration when they think outside that typical box called "our competition." In fact, getting out of that box is something all organizations can benefit from doing. Out-of-the-box ideas can be abundant but knowing which ones will pan out can be paralyzing. Identifying jobs to be won cuts through the uncertainty to help stakeholders align around a few high-probability growth strategies.

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●●● research careers

Living up to the name

From 'marketing researcher' to 'insights professional'

| By Carol Shea

snapshot

The author draws from an industry study to propose five behaviors that will help researchers evolve with the needs of their end clients.

While many corporate marketing research professionals have begun referring to themselves and their industry using the term "insights" (or, at the very least, they have increased their emphasis on delivering insights and not just data), a Boston Consulting Group study found that business leadership doesn't think that their insights personnel understand business issues. Further, these leaders think their researchers don't consistently answer the "so what" about the data they provide and don't translate research results into actionable business recommendations.

In addition, the 2016 Quirk's Corporate Researcher Report identified the pain points and challenges facing client-side insights professionals. The three top issues were: "too many projects for our staff," "too many projects for our budget" and, most critically, "not being able to get insights acted on." Research results not being acted on is an incredible waste of resources that torpedoes ROI in an environment where budget and staffing is already tight.

These critical problems require us to rethink not just what we call ourselves and the industry but how we conceptualize our roles and our departments in order to increase the value of the insights function and protect budgets. This article provides background into why these problems exist and share our vision for addressing them.

Critical pivot point

A quick historical recap of the marketing research profession[1] identifies how we reached this critical pivot point.

Era 1: Pioneer era – 1900 to 1950

The birth of the marketing research field began at the turn of the 20th century with pioneers like George Gallup and Elmo Roper bringing door-to-door survey research methods to connect marketers to consumers.

Era 2: Survey era – 1950 to early 2000s

This era brought scientific rigor in sampling and new analytical techniques. Phone became the mainstream way to reach consumers and online research and qualitative research were born. The

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marketing research function within companies became well established and grew.

Throughout these first two eras, marketing research's role was to answer questions as they arose within the organization: How should we price this product? Are consumers satisfied with our service? Why is the competition growing while we are not?

Thus, the management of the research function was largely focused on the management of research projects to answer these questions. Research directors sought to optimize each phase of the process: designing, conducting, analyzing and presenting research studies. They sought better analytical (e.g., multivariate methods), consumer connection (from door-to-door to online) and logistical (e.g., sampling, field recruiting) techniques.

Overall, the research function's role was to deliver knowledge to management.

Era 3: Insights era – 2010 to now

Rapid technological and societal change bring us closer to the consumer than ever with online panels, mobile and social research techniques. Studies that used to take months in Era 2 now take weeks. Simultaneously, the growing recognition of the importance of and the ability to collect and analyze large consumer behavioral data begins to overshadow our reliance on traditional research techniques. Big data is the "knight in shining armor" for many companies and corporate research departments have shrunk.

In Era 3, management still needs questions answered but they have new partners and tools to provide insights. They are awash in information and frustrated that they don't often enough understand the "so what" about the data nor receive actionable business recommendations.

The expectation about the research department deliverable has changed. Knowledge is no longer enough. Management expects insights departments to recommend actions as well.

Yet, the management of the marketing research function is still research study-focused and based on methods created during the first two eras where our management role was best described as project direction.

Profession has made strides

It's important to note that in the last decade or so the insights profession has made strides in becoming strategic, consultative partners with business clients versus simply project managers. Some of the positive trends include:

- In the early 2000s, researchers recognized the need to be more strategic and consultative. Industry articles envisioned researchers as knowledge curators, moving from reporting results to pulling together insights from many sources to create a well-rounded understanding of consumers that our clients require. Corporate marketing research departments and job descriptions started changing their names to include "insights."

- However, it wasn't until about 2010 that the term insights became the mainstream way to refer to our field. In that year, Forrester Research industry predictions began referring to the marketing research function as the insights function. The American Marketing Association changed *Marketing Research* magazine to *Insights* magazine in 2013 and the Marketing Research Association/CASRO merger has brought us the new Insights Association.

Having conducted over 30 in-depth interviews with senior insights leaders from a wide variety of Fortune 500 corporate teams in CPG, health care, finance, technology, services and others, our firm, InsightsCentral, learned that throughout this last decade, many researchers have successfully elevated their organizational roles to strategic insights partners. They have done so based on years of experience with a wide variety of management challenges, multiple research methods and great mentorship. These insights leaders shared their proven techniques for building strategic skills among their staff and they tended to fall into three camps – as exemplified in these quotes:

- The first quote emphasizes understanding and aligning with the business drivers – "*Prioritization and focus on key business questions by partnering with stakeholders before, during and after research to create alignment on approach, insights and recommendations.*"
- The second quote emphasizes the need to synthesize data and not be overly primary research focused to the exclusion of other techniques. It's not either/or it's AND. "*We have an emphasis on integrated analysis, going past the primary data and drawing on other sources of information in our analyses.*"
- The third quote emphasizes a theme of hiring the right talent – "*If you hire based on strategic thinking and curiosity, the rest should take care of itself.*" While we agree that you need baseline talents and motivations to succeed in any job, we shouldn't undervalue the human capacity to learn, which this third philosophy appears to do.

While these techniques work to slowly build strategic and consultative insights departments, they do not work fast enough for a profession facing the problems and pressures identified at the start of this article. Lean (staff and budget) insights departments mean that leadership doesn't have much time to mentor and quickly build these skills among new researchers and company management is not patient.

Too many insights departments are still functioning with an Era 2 mind-set. New researchers are well trained in research methods but lack an understanding of how to be strategic and consultative.

Of course, it is essential to effectively manage projects, but how can one be strategic when the primary goal is moving from one phase of a study to another? There is no clear and comprehensive development path for moving an Era 2 project management-focused research department to an Era 3 consultative, strategically-focused insights department.

New model needed

A new management model for strategic skills-building is needed to help directors train staff and help individual researchers build these new skills more quickly. So, our firm's team collaborated with sharp-minded, big-thinking insights and marketing professionals from successful Fortune 500 companies to define the specific skills and behaviors required for insights professionals to be more consultative and strategic as is required in Era 3.

To validate the specific behaviors and skills identified through our qualitative process, we designed and fielded a validation study in partnership with the Insights Association. Over 300 corporate insights professionals, the majority of whom were in management, participated in the study in 2016.

First, we asked all 300-plus corporate insights professionals the importance of being strategic. After all, we had assumed this to be the case from the large amount of secondary and qualitative research we conducted but we wanted to ensure we weren't overstating the need. Based on the response, there isn't any overstatement. Every participant, all 100 percent of the insights professionals, agreed that being more strategic was important to the profession (when was the last time you saw 100 percent in ANY result?).

In addition, nine out of 10 respondents agreed that improving strategic skills is important. But how can that happen more quickly?

Even with the methods described in the quoted statements above, corporate research professionals told us that improving the strategic skills of researchers is a tough job, as evidenced by the agreement levels to these statements:

Improving researcher/insights personnel strategic skill performance is challenging: 73 percent

Your current methods for developing researcher/insights professional actionable strategic skills are NOT adequate: 61 percent

Your organization does NOT provide the support (e.g., time, budget, resources) to build and apply strategic thinking skills: 48 percent

Figure 1: The Era 3 Model

Behaviors		Skill Qualities
	EXPLORE – Brings an "open-eyes" approach to the hypothesis and discovery process, allowing insights professionals and those around us to find new approaches, opportunities and solutions.	• Perpetually curious vision. • Eyes-wide-open attitude.
	REFINE – More keenly apply critical thinking skills to sharply focus on a stakeholder strategy that profitably attunes to the business's marketplace conditions.	• Think globally, act locally. • Follow-the-money focus. • Less-is-more discipline. • Knowledge-is-power perspective. • Start with the end in mind.
	ALIGN – Intertwine multiple stakeholder perspectives to improve the quality of and confidence in your end results as well as establish you as a full team partner.	• Define your position on the team. • Incorporate all internal considerations. • Create reasons to believe.
	HARVEST – Express and elevate the customer and marketplace voice in the decision-making process to influence the business ecosystem.	• Ensure that insights are absorbed. • Elevate insights so that they are used in decisions.
	EVALUATE – Evaluate your work. Be accountable for using the right methods, prioritize learnings and company needs and comply with your company's existing standard of performance measurements, their KPI's, to ensure you can prove and increase your value to the company.	• Don't bring a knife to a gun fight. • Avoid penny-wise, pound-foolish. • New tools should increase effectiveness. • Uphold a visionary perspective. • Maintain a "What is important now?" focus. • Grow from within while expecting change. • Help steer the ship to customer-friendly waters. • Help decision-makers be more resource efficient.

In essence, many professionals agree that we don't have the support or techniques in place to rapidly build these skills. InsightsCentral contends that one fundamental barrier is a lack of clarity around the definition and expectations of performing strategically. The professional literature describes qualities such as being "consultative," "proactive" and "better storytellers" as contributing to strategic skills. However, these vague qualities make it difficult for insights leaders to improve the strategic abilities of their staff.

Our team concluded that a better definition of Era 3 strategic skills and a path for building strategic skills that will move all insights professionals firmly into that era were critically needed. Therefore, based on the results of our qualitative and quantitative research, we developed the Era 3 model for managers to use to develop their staff and individuals to use to improve their skills.

The Era 3 model (Figure 1) is composed of five primary behaviors and over 150 specific skills and competencies. The five behaviors are defined as shown in the chart, along with the skill qualities that would be exhibited by a strategic, consultative insights professional.

In the last decade, the insights profession has made some progress from being viewed as project managers to consultative partners. But, as indicated by the facts shared at the start of this article and the results of our own analysis, there is a long way to go for us to live up to the name of "insights professionals." Too many executives have low confidence in marketing insights and don't consistently act on our deliverables. While it's true that business leaders and the insights team need to align on business objectives and how best to use research learnings, the onus is on insights professionals to make that happen or we'll continue to see our departments and budgets cut.

As an industry, we need to develop new ways of speeding up the strategic skills development of insights professionals and shift how the organization views the department's role towards being a strategic partner.

Management models that incorporate structured processes and job aids, such as the balanced business scorecard, the BCG Matrix and Deming's PDSA cycle, are established tools that shape the way we think, manage and run our organizations. The Era 3 model likewise provides a framework for working smart as insights professionals by: defining best-in-class strategic skills so that insights directors can more objectively assess and develop their team members; and providing individual insights professionals with a blueprint for building their own strategic abilities.

Models, structured processes and job aids can provide the blueprint individuals need to achieve excellence by being more strategic. These types of tools can reduce training time and build sustainable learning by allowing employees to learn more efficiently on-the-job. For insights management, these tools streamline processes and makes delegating easier.

By incorporating new management models, structured processes and job aids that support the ability to be more strategic and consultative in our roles, insights professionals can reduce the risk of research results sitting on a shelf unused and effectively bring the voice of the customer to critical business decisions.

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●●● the business of research

Don't jump to conclusions

Critical thinking for marketing researchers

| By Terry Grapentine

snapshot

Terry Grapentine explains how researchers can learn how to think, not only what to think, to improve marketing success.

In our recent book, *Critical Thinking for Marketers: Learn How to Think, Not What to Think*, my co-authors David Dwight, David Soorholtz and I focused on helping marketers reason more clearly but the book's topics are equally useful to marketing researchers. In particular, researchers' application of critical thinking skills not only helps them reason more clearly about marketing research issues but places them in a more valuable position to help the marketers they serve make better marketing decisions.

In part, the book describes 60 logical fallacies, which are errors in reasoning, in the context of real-world vignettes, drawn from our own experiences. The discussion below presents three such vignettes: Affirming the Consequent, the Ludic Fallacy and Appeal to Possibility.

Affirming the Consequent

Location: Off-site meeting between HR and the sales department.

Issue: HR and sales force management are reviewing the results of a sales-training system the company has had in place for 18 months.

Tom (human resources VP): "My department has reviewed the sales force's performance before and after we deployed the new training system. Sales are up and I, for one, would attribute that to the new training system. What do you think, Brian?"

Brian (sales VP): "Well, we spent a lot of time screening different training system companies and it seems we selected the right one. I vote that we continue with the program."

Tom: "I agree, Brian."

Tom and Brian are assuming that the improved performance of the sales force can be attributed to the training program and their inference seems reasonable. If the sales

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training program is effective and all other factors are held constant, sales would increase. Sales increased; therefore, the sales training program has been effective. This conclusion may be correct but the logic isn't.

Definition: Affirming the Consequent is a type of argument that takes the following form:

Premise: If A is true, then B is true.

Premise: B is true.

Conclusion: Therefore, A is true.

In the above vignette, Tom's argument takes this form:

Premise: (A) If the sales-training system is effective, then (B) sales will increase.

Premise: Sales increased (B is true).

Conclusion: Therefore, the training system is effective (A is true).

However, Tom's argument is not valid. Validity in this context means that, if his argument's premises are true, his conclusion is guaranteed to be true. The classic example of this kind of validity, which you probably first came across in college, is demonstrated in the following argument:

Premise: All men are mortal.

Premise: Socrates is a man.

Conclusion: Therefore, Socrates is mortal.

In this example, the premises are true and, as such, they logically guarantee the conclusion to be true – if Socrates is a man and all men are mortal, by definition, Socrates is mortal. In contrast, the logical structure of Tom's argument simply does not guarantee his conclusion to be true because other factors may have caused the sales increase. "If the sales training system is effective, then sales will increase" is Tom's premise but it is not a truism like "All men are mortal." Tom set it out as a true premise but that does not mean it is true. Training is not guaranteed to achieve the results; it might and it should but it is not a certainty. Sales and training have a more complex relationship than death and taxes.

Discussion: Sales might have increased, for instance, because of an improving economy, mistakes made by competitors, changing consumer tastes or the simple fact that the sales force is 18 months older and more experienced. Of course, you might find this to be a trivial logical fallacy or one that is self-evident. After all, we all know that "correlation is not causation." Nevertheless, training programs are expensive and management should require better justification to approve such expenditures.

Tom should be looking for multiple, empirically-based indicators that support the belief that the sales training program is working. He should not just focus on the single metric of sales volume if he wants to make a strong argument supporting his conclusion.

Think of it this way: If the sales-training system is working, what else should be true? Example empirical indicators that could corroborate Tom's claim might be the following: After the sales-training program, (1) the percentage of initial prospecting calls that result in a sale increases; (2) reps follow up on customers' inquiries quicker; (3) there are fewer customer complaints; and (4) customers express a higher level of satisfaction with the sales force's performance. The more relevant evidence Tom can produce to support his claim, the stronger his argument will be that the training program actually affected sales positively.

An important lesson for marketing researchers in this regard is not to let marketing managers believe that a marketing program's successful outcome means that the program was well-designed. Other factors could have played a role, which marketing research can shed light on. In this regard, one of the more famous examples often cited in marketing research textbooks, in chapters on experimental design, is called the Hawthorne Effect. "The term was coined in 1958 by Henry A. Landsberger when analyzing earlier experiments from 1924–32 at the Hawthorne Works [a Western Electric factory outside Chicago]. The Hawthorne Works had commissioned a study to see if their workers would become more productive in higher or lower levels of light. The workers' productivity seemed to improve when changes were made and slumped when the study ended."[1] Subsequent research indicated that it was not the varying light levels that affected worker productivity but the simple fact that management was paying attention to its workers.

Dealing with Affirming the Consequent: When a colleague confronts you with an argument that affirms the consequent, employ the following two strategies. First, simply point out that there are potentially multiple causes of B – the consequent of whatever A is. Second, help your logic-challenged friend think through the following question: If A is true, what else should be true in addition to B? If you can't think of anything, then maybe A is false.

Remember, antecedents don't necessarily guarantee consequents. Correlation is not causation.

The Ludic Fallacy

Location: Pharmaceutical marketing "war room."

Issue: Planning the advertising rollout of an over-the-counter flu remedy prior to the fall flu season.

Kevin (senior big data analyst): "In one of our recent big data projects, we examined tracking the word 'flu' in Google's search engine and found a high correlation between people doing Google searches on the word 'flu' and retail sales."

Laura (VP sales): "Wow, Kevin, that's an amazing result. Think about how we can use that information to manage inventory at the regional level, as well as to fine-tune our Internet ads and POS."

Raechel (logistics analyst): "That's a great idea. Our team can work with Kevin's and develop an inventory and distribution strategy for the next flu season."

Laura: "And I'll schedule a meeting with our digital group to work with them on honing our digital strategy."

This invented and abridged conversation certainly seems plausible, given that it is partly true. Google did publish an article in one of the top scientific journals, *Nature*, describing how accurately "Google Flu Trends" tracked the spread of that virus in 2008.[2] So, about now you might be asking, "Where is the fallacy here?" It emerges when we look at what happened a year after those data were analyzed, when the U.S. flu season seems to have confounded Google's algorithms.

Definition: Google fell victim to the Ludic Fallacy, in which highly precise (notice, we say "precise" not "accurate") statistical and probabilistic models fail to model the nuances of the real world. Google's estimate for the number of cases during the 2009 Christmas peak of national flu season was almost double that of the CDC and some of its state data showed even larger discrepancies.

Discussion: Ludic comes from *ludus*, a Latin word for game and was popularized by Nassim Nicholas Taleb in his 2007 book, *The Black Swan*. In his book, Taleb contends that complex statistical models and algorithms – the outputs of which are often used to support marketing arguments – are inherently biased because of the following factors:

• all relevant information about a topic is not in the possession of the statistician or the decision maker;

• small changes in the premises supporting a forecast may have large implications in the forecast; and,

• these models cannot take into account events that have never happened – for example, the mortgage crisis of 2008.

These factors are especially relevant to marketers (and it turns out, pollsters) who rely on marketing research that incorporates high-level statistical analyses – especially in regard to modeling consumers' anticipated purchasing (or voting) behavior. With respect to these studies, you should realize the following:

- Researchers cannot measure all facets of all consumer beliefs that affect brand choice. Human belief systems are simply too complex. "Not everything that counts can be counted" is a quote often attributed to Albert Einstein but most likely originated from a book written by William Bruce Cameron.[3]
- There are many factors surrounding consumer behavior that are impossible to measure. For example, how one's competitors will respond to a marketing effort.
- What is measured in marketing research studies is not measured without error. For example, survey respondents are notorious for their poor top-of-mind recall in reporting past brand purchasing behaviors.

And, to underscore the major weaknesses of highly precise statistical models is Taleb's black swan – the unforeseeable event (i.e., it was once believed that all swans were white, until a black swan – an unforeseeable event – was discovered in Australia).

Dealing with the Ludic Fallacy: How does one, then, ensure that the Ludic Fallacy does not infect one's marketing arguments? We have several suggestions:

First, all marketing research findings need to be combined with management's background knowledge. Ask the question, "Are the research findings logically consistent with everything we know about this subject matter?" If not, investigate. Don't let the numbers do the thinking for you.

Second, brainstorm alternative

scenarios regarding a marketing effort, based on different assumptions. For example, when launching a new product, consider different launch scenarios based on different competitive responses or changes to the economy. The goal is not necessarily to uncover these black swans as it is to be flexible and adaptive as you determine that not all of the assumptions on which the launch plan is built are actually correct.

Third, as we've discussed in previous vignettes, don't confuse correlation with causation in any big data or marketing research analysis. If you're not sure or misinterpret what is causing the correlation between two factors, then you don't really understand what can derail that correlation.

Regarding the last point, in examining customer satisfaction scores and sales for a major power sports manufacturer, management discovered a positive correlation between sales and customer satisfaction, which management attributed solely to their product's quality. Over time, as the company grew, these satisfaction scores declined although product quality – as measured by metrics such as warranty claims – stayed constant. The problem was that, as the company got larger and took on more independent distributors, the quality of the distributors' customer service declined. This was not discovered until some damage had been done to the manufacturer's brand equity. Had managers better understood what was causing the initial high customer satisfaction scores, they could have been more proactive in screening and managing the independent dealer network.

Again, don't let the numbers do your thinking.

Appeal to Possibility

Location: "War room" of a national consumer products manufacturer and marketer.

Issue: Brand strategists are debating plans for increasing the market share of one of their shampoo brands. To increase share, should they focus on increasing purchase frequency or market penetration?

Conner (brand manager): "The market our shampoo brand competes in is ultra-competitive. So Jackie, I just think we'll be better off trying to increase our brand's market share by getting our customers to use our brand slightly more frequently rather than trying to steal brand share from our competitors."

Jackie (CMO): "Either way, Conner, it's not going to be easy. Certainly, if we try to steal share, we're going to have to increase our ad budget."

Conner: "Regardless of the strategy, we'll need to spend more on advertising. Right now I'm thinking about the strategy for the campaign. I think we need a campaign to drive frequency rather than win new customers. The Nielsen data show that the customers of the larger market-share brands purchase their brands slightly more frequently than do our customers. So it is possible to drive frequency. And if it's possible, I'm sure we can pull it off."

Jackie: "Well, I can't think of any reason why your suggestion won't work. OK, let's develop a campaign aimed at frequency."

Just because something is possible doesn't mean that it will be true. Moreover, "possible" is a vague term and begs the question, "How possible?" Future events with probabilities of occurring 1 percent and 99 percent are both "possible," yet the former is not likely to happen, whereas the latter is more probable.

Definition: Appeal to Possibility occurs when someone asserts that if X is possible, then X is likely to be true. But an Appeal to Possibility often appeals to other logical fallacies, directly or implicitly, for its justification.

Discussion: In the above example, Conner links his Appeal to Possibility to Nielsen data showing that larger market-share brands are associated with higher purchasing frequencies. His stated premise is that increasing purchase frequency is something that the larger brands do through advertising and concludes that it is something they can replicate purely because it is possible.

First, Connor is correct is claiming that higher market-share products have somewhat higher purchase frequencies.[4] However he's incorrect in his direction of causation (the large brands advertised their way to frequency of use) and, thus, has inadvertently used the correlation-is-causation argument as justification for his Appeal to Possibility.

The interesting facts that Conner does not know (and have nothing to do with this fallacy) are that, generally, as market share increases so does "mental and physical availability" of the product. Compared to small-share brands, larger-share brands have higher consumer awareness and physical distribution, causing a kind of selection effect in which larger market-share brands simply capture relatively more heavy users than smaller-share brands do.[5] So causality goes the other way – increasing frequency of product usage does not cause market share growth but market share growth attracts heavier brand users.

In addition to often invoking a false correlation-causation relationship, Appeal to Possibility often joins ranks with Appeal to Ignorance for its justification – "Well, Action X is possible, and no evidence exists that refutes my claim!" But lack of evidence is not evidence supporting a proposition.

The same is true when combining an Appeal to Possibility with an Appeal to Novelty. You often hear Appeal to Novelty when you go to a marketing research conference. Someone is giving a talk about the latest and greatest bells and whistles. Companies latch onto them because of their novelty and possibility. What consultant Annie Zelm calls the "grapefruit diet strategy" is one of these fads, in which a firm focuses on a single strategy – say social media – versus integrating multiple strategies to ensure product success. In general, there is an attempt to simplify, and this is how appeals to possibility and novelty combine – it is simple (and romantic) to assume that the novel approach is working by itself, not that it is part of a more complex mix. Without disciplined diligence to find the root cause through causal analysis, marketers often link the desire to believe in the novel with the desire to believe in possibilities and come up with a fashionable me-too strategy that most likely will not work. As discussed by Zelm:

"The grapefruit diet has been around for decades but it seems we still haven't learned we can't live on citrus fruit alone. Nor should marketers rely entirely on a single marketing strategy while neglecting others. Some businesses lean so heavily on social media that they've significantly reduced their efforts in inbound marketing, public relations, e-mail marketing, direct marketing and traditional advertising.

"Social media offers the obvious advantages of instant communication and direct engagement, so it's hardly a passing fad. That said, it's a mistake to assume your 50,000 Facebook 'likes' are 50,000 likely clients or that your target audience will find you on Twitter without being prompted to look. Social media is important but, like all other tactics, it's just one element of a balanced marketing strategy. To be successful, you need to engage your audience across multiple channels online, in person and on paper."[6]

Dealing with Appeal to Possibility: Here are two thoughts on how to deal with Appeal to Possibility:

- Don't use the word *possible*; use the word *probable*. In most cases, this is the more correct term. Most things are possible but not everything is probable.
- Investigate tacit assumptions. Does an Appeal to Possibility implicitly assume another logical fallacy for its justification (e.g., Appeal to Ignorance or Appeal to Novelty)? Perform some due diligence of the causal link.

Failed in one fundamental way

As many as 95 percent of new product introductions fail, according to AcuPoll, a Cincinnati research firm.[7] Do you remember New Coke, Coors Rocky Mountain Spring Water, Kellogg's Breakfast Mates, McDonald's Arch Deluxe and HP's TouchPad? Yet, during this same period, we've seen an ever-growing number of marketing conferences, seminars and books dispensing advice to marketers on "how to be successful." A recent Google search of "marketing success" turned up 296 million references!

How do you explain this paradox? We believe that most of these efforts to improve business performance have failed in one fundamental way: Although many organizations and consultants provide excellent advice on what to think when formulating marketing strategies and tactics, they have failed to help today's marketer and marketing researcher know how to think about these issues.

By constantly working to develop and improve your critical-thinking skills, you'll avoid falling victim to the fallacies outlined above and derive the most value from the insights you gather for your company or organization.

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new product research

Doing the coolhunters one better

A case study in sales forecasting

| By George Terhanian, Matt Powell and Jia Guo

snapshot

The authors explore how they predicted first-year sales of the Under Armour Curry 2 basketball shoe.

Before Malcolm Gladwell became a super-famous writer, he penned a long article in *The New Yorker* in 1997 that chronicled the adventures of professional coolhunters searching for the next big thing in the athletic shoe industry. Gladwell wrote about people named DeeDee and Baysie who scoured the edgiest streets of big cities everywhere for what was hot, before it became mainstream hot. The companies they worked for – Converse, Reebok, others – then placed bets on which shoes to take to market.

If you dig deeper, you realize this approach didn't deliver the goods. As Gladwell observed, there's a fundamental challenge to coolhunting: "The quicker the chase, the quicker the flight." In other words, once everyone knows what's cool, it's no longer cool. That's not a good thing for an athletic shoe manufacturer, particularly when it can take 18 months for a shoe to move from the drawing board to the store shelves.

There are other challenges with coolhunting, too. It places a tremendous amount of faith in a small number of so-called experts, which runs counter to today's more contemporary "wisdom of crowds" philosophy. Why rely on a handful of experts when, through technology, your customers and prospects can be at your near-immediate beck and call?

So if you're Converse, Reebok, Nike, Adidas, Under Armour or any company trying to make killer products people love, you need to make sure you've got a trustworthy way to distinguish the winners from the losers, no matter how you come up with the product ideas. You also need to move fast to account for how quickly fashion trends change. You might even need to plan for a hot category's imminent decline or even its obsolescence. Before we dive into the specifics, we'll set the scene, beginning with a brief overview of the athletic shoe market.

quirks.com/articles/2017/20170810.aspx

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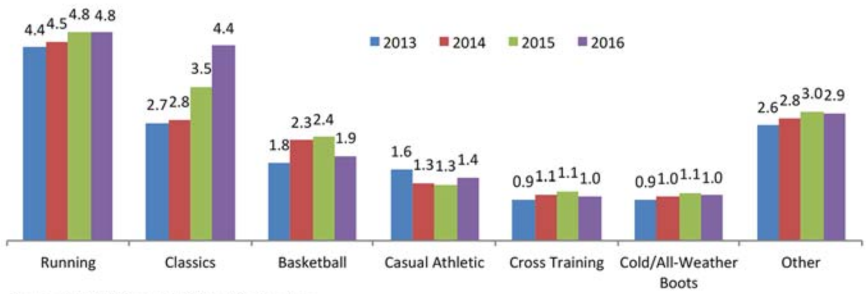
Figure 1: U.S. Sales of Athletic Shoes in USD Billions from 2013-2016, by Type



Source: The NPD Group Retail Tracking Database

Grown steadily

These should be decent days for athletic shoe manufacturers. The market has grown steadily over the past few years, with sales of $17.5 billion in 2016, a $400 million increase compared to 2015, and a $1.7 billion increase versus 2014.

But people's tastes and preferences change quickly, with fashion cycles in sport compressing. These days, a three-year cycle can be a lifetime. That's a dramatic decline compared to a decade ago, and a massive one compared to a century ago when Converse Chuck Taylors, in all their canvas glory, were about to embark on a four-decade market-leading run.

In 2015, as Figure 1 shows, classic kicks like retro basketball and running shoes were in high demand, growing in sales from $2.8 to $3.5 billion after near-zero growth the year before. Performance basketball shoes suffered the opposite fate, barely moving the needle in 2015 after fabulous $500 million growth to $2.3 billion in 2014. Basketball shoes didn't exactly rebound in 2016, with sales of $1.9 billion, down $500 million compared to 2015. And if classics were hot in 2015, then they were red hot in 2016, with sales up another $900 million to $4.4 billion.

For a relatively young brand like Under Armour, the popularity of classics poses an obvious challenge: It's hard to roll out classic shoes systematically when you've not been around very long. Nike and Adidas, in contrast, are positioned perfectly to exploit the opportunity, as evidenced by the ongoing re-release of various retro Jordan styles and skyrocketing sales of the old-school Adidas Superstar in 2015 and 2016. Both brands have got a lot of styles left in the vault, too.

Important considerations

Context and culture are important considerations for brands that are thinking about developing and taking to market a new shoe. A few years ago, for example, shoe companies knew that many kids wanted to be a baller or at least look like one. They dreamed about it. They practiced the moves. They mastered the walk. They talked the talk.

These kids aren't that much different from those of earlier generations. For instance, it's almost impossible to find a photo of a serious hoopster, or hoopster wannabe, from the 1920s through the 1960s not wearing Chuck Taylors. Then came the 1970s, when Adidas arrived on the scene. "If Adidas can make NC State's David Skywalker Thompson fly, then maybe they can make me fly, too," the kids would say. That's until they saw Julius Erving in his signature Converse Dr. Js take off from the foul line, shift into mid-flight maneuvers, elevate to the rafters and then throw down a thunderous dunk.

Converse Weapons were the brand of choice thereafter. Magic, Bird, Isaiah – they all wore them. When Michael Jordan descended from the Carolina blue sky in the mid-1980s, things really started to change, with the big shoe companies recruiting and rewarding a bevy of basketball superstars – Sir Charles, Patrick Ewing, TMac, Penny Hardaway, Allen Iverson, Reggie Miller, Kobe, KG, Derrick Rose, LeBron, Kevin Durant, Kyrie Irving and Steph Curry, to name several – for signing their names to their shoes.

Table 1: Comparative Performance of the Curry 2 Low vs. Key Competitors and Norms

Quintile Ranking →	1 0-20%	2 21-40%	3 41-60%	4 (61-80%)	5 81-100%
Overall Purchase Intent		KD8	C2 Low; C2 High; LB13		
Intensity of Liking		C2 High; LB13; KD8	C2 Low		
Price and Value	LB13; KD8	C2 Low; C2 High			
Uniqueness			C2 Low; C2 High; LB13; KD8		
Believability		C2 Low; C2 High; LB13; KD8			
Need Fulfillment		C2 High; LB13; KD8	C2 Low		
Better than Competition		C2 High	C2 Low; KD8	LB13	

Source: The NPD Group

Table 2: (Expected) Source of Volume for the Four Shoes

	Curry 2 Low	Curry 2 High	LeBron 13	KD 8
A similar product from Under Armour	16%	14%	6%	10%
A similar product from Nike	29%	41%	48%	44%
A similar product from Adidas	10%	7%	13%	10%
A similar product from New Balance	7%	6%	6%	9%
A similar product from Reebok	11%	3%	8%	5%
A similar product from Puma	4%	5%	3%	2%
A similar product from Asics	6%	4%	4%	4%
A similar product from a brand not listed	6%	4%	2%	6%
Nothing	12%	16%	10%	11%

Source: The NPD Group

Although many kids today still want to be ballers, it's less important to look like one. That's a major reason for the decline in the performance basketball shoe market. But basketball shoes are still big business, with the major brands in a heated competition to sign and retain the best players, sometimes for life in LeBron James' case. Most industry analysts also attribute Under Armour's remarkable rise in the basketball shoe category to its relationship with two-time NBA most valuable player Steph Curry.

Speaking of Steph, we heard the buzz last year during the 2016 NBA playoffs about the Chef, the low-cut all-white version of the Under Armour Curry 2. Comedian Jimmy Kimmel anointed them "a great pair of shoes ... whether you are a Steph Curry fan or just a middle school lunch lady." Others described them as the shoe of choice for the early-bird discount dinner crowd. And even we wondered whether coolhunters (if they exist anymore) would start combing the world's hippest assisted-living centers for the next big thing. But none of that seemed to bother Steph. A hand in the face. A slap on the elbow. A poke in the eye. An elbow to the ribs. He deals with that stuff all the time. They're "fire," he said, when asked about the Chef.

Find out for ourselves

As much as we'd like to take Steph at his word, we decided to find out for ourselves. Through survey research, we assessed the appeal and then estimated likely first-year sales of the Curry 2 Low basketball shoes – not only the all-white Chef but its colorful siblings, too. We also assessed the Curry 2 High, the Nike LeBron 13 and the Nike KD 8 – all launched previously – to understand how they compared to the Curry 2 Low on key measures. (Although Under Armour launched the Curry 2 High a bit before the Curry 2 Low, we decided to produce a first-year forecast for it, as well. For additional details on methodology, please see the sidebar.)

Through this process, we learned that you can't always trust comedians or snarky sneakerheads. Despite being mocked, the Curry 2 Low turned in a slightly stronger concept test performance overall than its Curry 2 High counterpart. Compared to all shoes in our concept-testing normative database, however, the Curry 2 Low did not stand out. In fact, we identified no hall-of-famers among those we tested, with the LeBron 13 the only one to place in Quintile 4 or 5 in at least one category (Table 1), which is where you really need to be for sales to soar.

Really needs to appeal

The dynamics of the basketball shoe market are fascinating, partly because the market is shrinking and partly because of Nike's dominant presence. Including the Jordan brand, Nike accounts for more than 80 percent of unit and dollar sales in the U.S. That's great for Nike but it can also present challenges. If Nike introduces a new shoe, then it's likely that a lot of people who'll buy it are previous Nike buyers. That's how it works for a big brand with substantial market share. If a smaller brand like Under Armour rolls out a new shoe, however, then that shoe really needs to appeal to previous Nike buyers; otherwise, Under Armour won't grow share. It needs to take sales from its competitors, not itself.

So how are these dynamics playing out? We explored this question within our survey by asking respondents who expressed interest in buying a particular shoe (among the four tested) what brand they would buy if that shoe were not available.

As Table 2 shows, Nike would be second choice if any of the four first-choice shoes were not available. On the one hand, that's good news for Nike – it's part of the reason why Nike's the major player in the category. On the other hand, the Curry 2 Low and High are (Nike) share stealers. That should please Under

Armour, not Nike.

So was the Curry 2 Low "fire"? We forecasted[1] the Curry 2 Low to sell 54,400 units in its first full year in the U.S., a small number compared to our forecast of 862,000 first-year units for the Curry 2 High. Why such a seemingly low figure for the Curry 2 Low? There were at least six reasons:

- More people buy high- than low-top basketball shoes – that's just the way it is.
- You could not find the Curry 2 Low in as many places as the other shoes we tested. But that may have been intentional; a successful limited-edition product can do wonders for a brand.
- Timing was not quite right. Under Armour launched the first Curry 2 Low in February, after the December holiday buying season and too late to take full advantage of people's propensity to buy in February and March. An October or November launch would have been preferable from a sales optimization perspective.
- Steph Curry's performance in the 2016 NBA finals was less than stellar. That didn't help shoe sales.
- Sales of performance basketball shoes, overall, were declining, as Figure 1 suggested.
- It was our understanding at the time of the forecast that Under Armour had taken its foot off the Curry 2 pedal in preparation for the Curry 3 launch.

Of course, Under Armour may have factored most of this into its strategy. Case in point: the Chef was not available several months after its launch on the Under Armour Web site – it had sold out.[2] So maybe it was indeed "fire," as Curry proclaimed.

Near-perfect

So, how did we do? Our Curry 2 High forecast of 859,991 first-year unit sales was near-perfect, off by about 2,000 units. Our Curry 2 Low forecast of 54,440 unit sales was too conservative, primarily because we did not expect retailers to keep so many Curry 2 Low shoes on the shelves for so long. Nor did we expect Under Armour and retailers to break from the past and cut the Curry 2 Low price by about 20 percent at year's end and more than double that at the start of the new year. Combined, these two factors increased Curry 2 Low first-year sales to 68,314 units. If we had worked directly with Under Armour to produce the Curry 2 Low forecast, rather than making our own assumptions about the company's marketing activities, the input to our forecasting model would have been more accurate and our Curry 2 Low forecast would have been spot on. Had this been a slam dunk contest, we'd give our overall effort a score of eight, possibly nine, out of 10, but with room for improvement.

Testing new or enhanced product concepts systematically to estimate their sales potential makes a lot of sense, particularly when the resulting evidence informs important decisions on price, marketing, distribution, production, positioning, product features and the like. Mistakes can be costly. And they're easy to come by in the athletic shoe industry – and other industries, too. A rigorous concept test replete with a precise forecast of future product sales is an important safeguard for any company to put in place.

Obviously, it's important to come up with great product ideas, too. Maybe coolhunters like DeeDee and Baysie can help, although there are a lot of other ways – more effective ones – to generate product ideas today. But when you're able to put a number (i.e., expected sales) on those ideas, as we've done here, it makes it much easier to make the right decisions.

So what can you learn from testing a new concept? Or testing the actual product – your own or a competitor's – once it hits the shelves? Can you forecast sales? Ensure you're able to stock the shelves to meet expected demand? Plan for future scenarios? Figure out what people want and need? Identify likely buyers and their characteristics? And, in basketball lingo, "beat your opponent to the spot"? Absolutely. That's why we've shared this case study. Information. Insight. Intelligence. A 3-pointer.

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[2]The rest of the Curry 2 Low line is available online.

Details on the sales forecast methodology

To evaluate and compare the four shoes fairly, we assigned each survey respondent – 1,456 men aged 16-65 who purchased athletic shoes in the previous 12 months – randomly to one of four shoe concepts (specifically, shoe descriptions). Between 354 and 378 men with identical or nearly identical characteristics then evaluated one shoe concept only. Next, we forecasted first-year sales, taking into account several factors:

1. Performance on key, predictive survey measures: purchase intent; intensity of liking; price/value; uniqueness; believability; need fulfillment; better than competition

2. Normative information for similar products in our concept testing database

3. Expected and actual shoe distribution, using our point-of-sale (POS) data

4. Under Armour's expected marketing spend

5. The size and changing nature of the athletic shoe market using our POS data, and specifically, dollar sales, units sold, average selling price and sales velocity (which you can think of as sales adjusted for distribution) for: the athletic footwear category since 2013, by month; athletic footwear by type (e.g., running shoes, basketball shoes) since 2013, by month; high- and low-top basketball shoes since 2013, by month; brand share for Nike, Adidas, Under Armour and others

6. Past sales performance of similar shoes, using our POS data

7. In-market sales performance of each tested shoe, using our POS data, specifically: dollar sales, units sold, average selling price and sales velocity since June 2015


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DATA VISUALIZATION DIRECTOR

With over 15 years of experience in data design, analysis and reporting – and now leading the data visualization efforts for E-Tabs – Sanford is a market research visionary in many senses of the word.

As the industry continues to embrace effective visualization of data, Sanford acts as shepherd on this journey. Along with his team, he supports research agencies and insight teams across the globe in delivering interactive dashboards, tailored to the unique requirements of research. The bespoke service brings a wealth of insights to researchers' fingertips, empowers them to tell engaging stories with data and ensures greater efficiencies by reducing a time- and labor-intensive stage of research. Any project requiring a dashboard will benefit greatly from consultation with Sanford and the team.

His next vision for the research landscape is the ongoing development of a new dashboard-design tool catering to the specific needs of market research, something no other tool does adequately. Get in touch with E-Tabs to discuss your dashboard needs.

www.e-tabs.com
0208 205 4665
info@e-tabs.com

FACES of MARKETING RESEARCH

Global health care specialists from coast to coast

FROM LEFT TO RIGHT: CLAIRE RICHARDSON, DIRECTOR; TOM NOLTE, HEAD OF BUSINESS ANALYTICS NORTH AMERICA; RACHEL HOWARD, DIRECTOR; TOM WINTER, DIRECTOR

Research Partnership is celebrating 20 years in business this year with expansion across the U.S., opening new offices in San Francisco and New York. With headquarters in Philadelphia and a satellite office in Boston, Research Partnership is now expertly placed to support global pharma from West to East Coast. We shine a light on four of our key faces of research.

Tom Winter has relocated from London to run San Francisco. With 14 years of experience and a background in genetics and life sciences, Tom has established himself as an expert in immuno-oncology, immunology and virology and been instrumental in helping shape the launch strategies of various market-leading products. Tom loves SF, although work is keeping him busy, so he's on the hunt for more faces to expand the team!

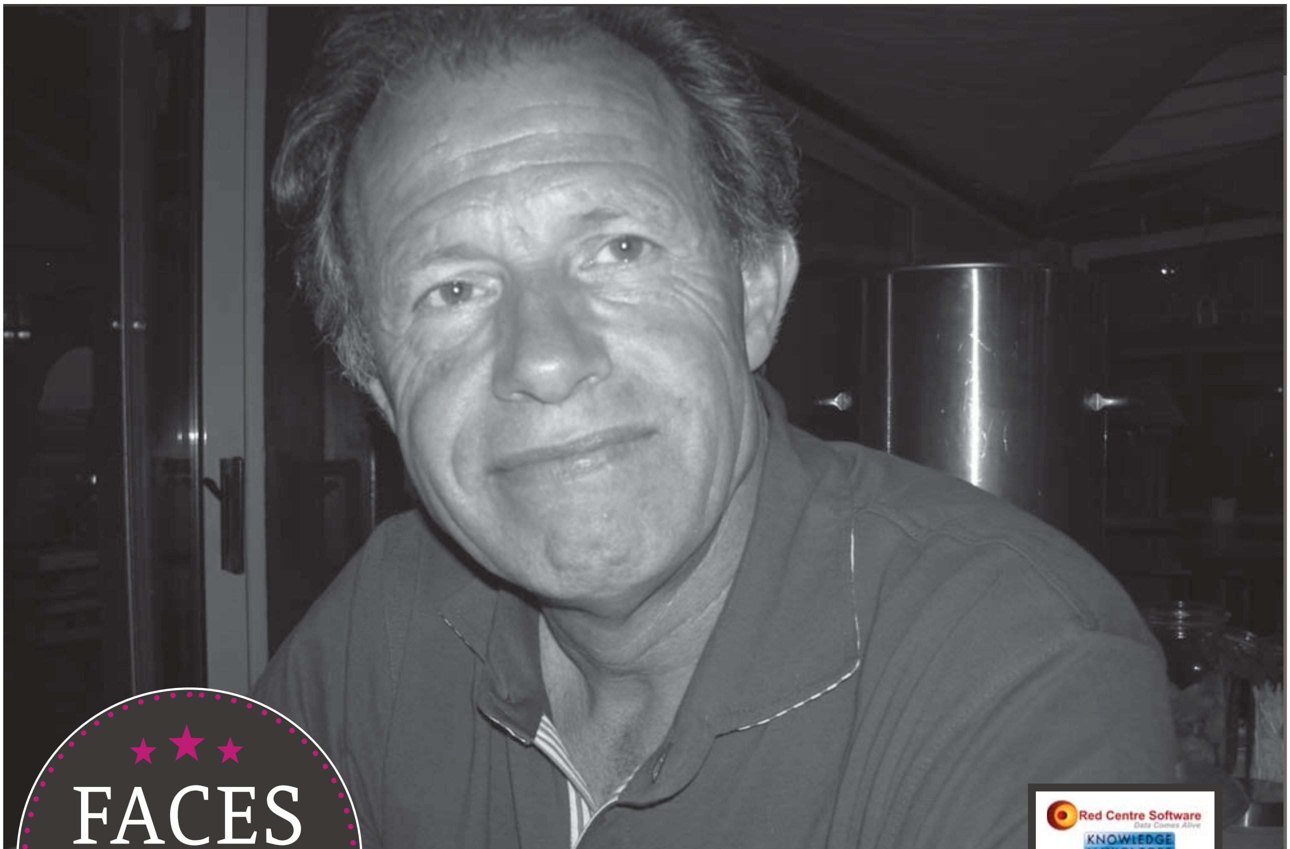
Claire Richardson heads up Boston. A seasoned market research professional, Claire has gained a reputation for expertise in patient understanding and recently co-hosted a successful Webinar on patient centricity with *Pharmaceutical Executive*. She pioneered the use of simulated consultations at RP and is a strong proponent of observational research techniques as a means of gaining real-world insights in health care.

Tom Nolte has made a significant contribution across the company since he joined the Philadelphia office a year ago. Tom's expertise in individual-level choice modelling, segmentation and price-demand assessments has helped cement RP's position as a leader in advanced quantitative techniques. His background in radio also means he's a joy to listen to!

Rachel Howard heads up the office in New York and has become an expert in emerging markets, having started her career in Singapore. Rachel is a keen commentator on the pharmaceutical industry and has had many articles published in the trade press, co-presented Webinars and spoken at various industry conferences. With offices on Madison Avenue, Rachel's biggest fear is maxing out her credit card!

Research Partnership is now hiring. Visit www.researchpartnership.com/careers.

researchpartnership.com
215-682-9200
info@researchpartnership.com



FACES of MARKETING RESEARCH

Research software solutions expert

TON KOSTER
MANAGING DIRECTOR

Ton Koster is managing director of Knowledge Navigators, a market research solutions firm based in the Netherlands that provides expertise and solutions that focus on research, analytics and technology. Ton specializes in providing solutions that help companies' data process and analysis teams that are for instance working with Quantum and Quanvert solutions to maintain and update end-client deliverables. Using Ruby products by Red Centre Software, Ton can assure your team has the right tools to manage customer projects.

The Ruby line of research software was created by market research professionals who have many years of industry experience with ad hoc and tracker studies that are often combined with complex data structures prepared with innovative cleaning, weighting and construct features.

With the Ruby line, our market research professionals can provide modern state-of-the-art Windows-based software with the same strength and capabilities as your current software, plus integration with MS office, Visual Studio or VBA, SPSS and R to provide decks of tables and charts in PowerPoint, Excel, Word or for online interactive deliverables on PC, IPhones, smartphones or tablets.

Along with providing the software, Knowledge Navigators go the extra mile to provide technical services that support the customer relationship.

Our company can supply and support the various types of Ruby products offered by Red Centre Software, which include the flagship application Ruby Desktop, a professional crosstabulator; Ruby Laser, which runs in Windows browsers to provide online access to Ruby Data; RubyGo (designed for tablet display) and its companion RubyPocket (designed for phones) to provide access to Ruby online Reports and interactive Ruby Dashboards.

Contact Ton at Knowledge Navigators to help you with a smooth transition to Red Centre Software's market research solutions.

www.knowledge-navigators-research.com
www.redcentresoftware.com
+31(0)653329348
ton.koster@knowledge-navigators-research.com

FACES of MARKETING RESEARCH

Passion in social sciences and behavioral economics

MARGARET MUELLER
PRESIDENT

As a sociology Ph.D. student, Margaret Mueller learned quickly that academia was not for her. Instead, she had fallen in love with market research – specifically the company where she had worked before going back to school.

That company: Shapiro+Raj (then known as Leo J. Shapiro & Associates). "It was everything I loved about sociology," Margaret says. "Understanding people's attitudes, motivations and behaviors; what drives them; and why they do what they do."

Over her 14 years at Shapiro+Raj, Margaret has been a driving force of the company's evolution from traditional market research to a leading branding and marketing insights company that integrates social sciences and behavioral economics with account planning and brand strategy. Now as President, Margaret – with CEO Zain Raj – is leading a 60-year-old company, with a rich history of rigorous social science-based market research, into the future. "The world is changing so quickly that the old ways of operating don't work anymore," Margaret says. "We are developing methods and tools that help our clients connect the dots between what people think and feel and what they actually do."

Shapiro+Raj also helps clients pull together all their disparate data and information, identify the most powerful commercially-viable insights and craft strategic plans for their brand.

At the heart of Shapiro+Raj's work are the social sciences and behavioral economics – Margaret's intellectual passions. But Margaret is happiest working with clients to solve business problems. "This industry has felt like a real gift for someone who is a social scientist at heart, but wants to live in the world of business," she says. "Distilling weeks of research down to a few nuggets of insights into what will actually have an impact on a client's business – that's a real art. And I get to sit at the intersection, between the art and the science."

www.shapiroraj.com
312-321-8293
margaret.mueller@shapiroraj.com

FACES *of* MARKETING RESEARCH

Customer relationship expert

CORY LONG, DIRECTOR CLIENT DEVELOPMENT - CUSTOMER EXPERIENCE MEASUREMENT

Cory joined Toluna in 2014, coming from Forrester Research. At Forrester, Cory was responsible for managing client relationships, promoting customer satisfaction and loyalty by demonstrating an understanding of customers' critical business issues and delivering products and services that help clients meet their business objectives.

Cory has taken his experience at Forrester and applied it expertly to his approach to working with Toluna's CEM clients.

At Toluna, Cory is responsible for managing client relationships for our Customer Experience Measurement offering. Day-to-day, he helps leading brands collect voice of the customer feedback in real-time, obtain a better understanding of customer experiences and sentiment and make expert recommendations on how to integrate real-time feedback with Toluna's vast digital insights portfolio. This real-time feedback empowers companies to react quickly and capitalize on success or course-correct efficiently.

Since joining in 2014, Cory has demonstrated Toluna's consultative approach to working with both current CEM clients and prospects in building and executing the best CEM solution for their brand from Toluna's suite of offerings. This approach has allowed leading companies to bring customers into the heart of their brand – thus increasing sales and helping make more effective marketing decisions as a result.

About Toluna

Toluna is a leading provider of real-time digital consumer insights and empowers companies to brainstorm ideas, uncover new business opportunities and answer their questions in real-time. Toluna is transforming the way marketing decisions are made by bringing consumers and brands together via the world's largest social voting community of 13+ million members across 68 countries. This real-time access to consumers is coupled with its state-of-the-art market research survey and analytics platform. Toluna has 21 offices in Europe, North America, Asia Pacific and MENAP.

www.toluna-group.com
203-834-8585
toluna@toluna.com

FACES of MARKETING RESEARCH

Pioneer in online research

LISA WILDING-BROWN
CHIEF RESEARCH OFFICER

Lisa Wilding-Brown has been in the industry since the inception of online research. Lisa's specialties include sampling and survey design, panel development and management, online and mobile recruitment and full-service mixed-mode field management. As Chief Research Officer, Lisa is responsible for panel quality, best practices and sampling methodologies as well as spearheading the firm's DIY platform scheduled to debut in 2017.

Prior to Innovate, Lisa was part of the executive team at uSamp where she developed the company's global panel and led its mobile business division. Lisa got her start in market research at Harris Interactive, where she helped develop the company's full-service online project management group. She later joined the panel team, focusing on research-on-research, survey methodology, specialty panel development and online user engagement for the Harris Poll Online.

Wilding-Brown serves on the boards of the MMRA and UTA's Master of Science in Marketing Research, has presented at various conferences and has published research related to online survey design, online quality and mobile best practices. Lisa chairs a committee focused on enhancing user experience for the Insights Association's Online Sampling Forum and is an active contributor to the GRBN's participant engagement initiative.

innovatemr.com
888-229-6664
sales@innovatemr.com

FACES of MARKETING RESEARCH

Innovating shopper research

COLIN VALDISERRI
CO-FOUNDER AND CEO

In 2004, Colin Valdiserri and Jacob King formed Informed Decisions Group to focus on non-traditional research methods centering on the behavioral sciences. With Colin's background in consumer psychology and Jacob's expertise observational insights, IDG grew to become a differentiator in shopper research.

IDG uniquely leveraged our consumer science background with new technologies, including mobile eye-tracking, neuro-measurement, micro-expression coding and virtual shopping. This paved the way to innovate new shopper metrics from online to brick-and-mortar, helping clients develop and optimize touchpoints throughout the entire shopping process.

Under Colin's leadership, IDG became the first to successfully model purchase behavior to visual attention and specializes in solutions for shelf insights, package optimization and conversion measurement. Our approach leverages a fusion of quantitative data and qualitative intimacy with a team of moderators who were the recipients of the Gold IDEA (Industrial Design Excellence Award) in the research category for highly successful new product development and launch.

www.idg-consulting.com
440-454-0399
sjohnston@idg-consulting.com

FACES of MARKETING RESEARCH

International fielding specialist

ABBY GOODELL
VICE PRESIDENT, FIELDWORK NETWORK INTERNATIONAL

Fielding research in countries all over the world takes a lot of experience. Abby Goodell has years of it. Abby has been with the Fieldwork organization for 19 years. She started as a recruiter in the Fieldwork Denver office and then embraced roles as a client services manager, facility director of the N.Y. office, multi-market project manager for Fieldwork Network and most recently global project manager of Fieldwork Network. As the newly-appointed vice president of Fieldwork Network International, Abby leads a team of project management specialists set up to cover all time zones. Fieldwork has fielded projects in 50 countries over the past 35+ years.

As global management specialists, Abby and her team handle all aspects of the fielding process, which includes multi-market proposals, screener advice and development, overseeing the recruiting and data collection process, coordinating local logistics like moderation and translation and ensuring on-site clients are cared for from Bangkok to Barcelona. All of this concludes with a single consolidated invoice. Abby and her team make conducting research in far-flung countries as smooth and seamless as possible.

Abby particularly enjoys the connections she makes with clients. She understands that each study is unique and requires constant and detailed communication. She brings this value of partnership to her entire team. "Teamwork is at the heart of everything we do. Creating partnerships with our clients and local vendors is critical to conducting successful research, particularly across continents. And it makes the job fun."

About Fieldwork

Fieldwork has been a leader in world-class marketing research services and facilities for over 35 years. As market research has expanded from the standard focus group to incorporate other methodologies and technologies, Fieldwork has expanded with it. We have 15 research facilities across the U.S., a multi-market project management team that covers the globe and recruiting capabilities for any type of project in any location.

www.fieldwork.com
800-863-4353
abbyg@networkintl.fieldwork.com

FACES of MARKETING RESEARCH

Seasoned research professional

ASHLEY CUNNINGHAM-MORRISON
EXECUTIVE DIRECTOR

C&C Market Research started as a "boots on the ground" business over 25 years ago and continues to be a leader in the market research industry today. Craig (president) and Cindy (vice president) have grown the company from the single office they began with to over 45 geographically-dispersed offices across the United States in high-traffic shopping centers where C&C can help with all of your F2F data collection needs. We have also built up extensive databases over the years which allow us to assist with online market research projects as well. From projects with hard-to-find respondents and small samples to projects with general-population respondents and extremely large samples, C&C can help with them all.

With few exceptions, our entire management team started out as those "boots on the ground" and worked their way up to the positions they hold today. This gives us all a great understanding of the market research process and what it takes to successfully complete a project. Once a project has been commissioned to C&C, an experienced project manager is assigned to manage the day-to-day operations of the project. By having multiple C&C team members watching all projects, we ensure the highest level of quality and communication throughout project completion. Our corporate team, local staff and facilities, coupled with our proprietary programming and data transmission capabilities, have ensured countless successful projects for our clients.

Executive Director Ashley Cunningham-Morrison is no exception to those "boots on the ground." From an early age, Ashley helped Craig and Cindy, more affectionately mom and dad, with the business. She began as an interviewer/recruiter in the Fort Smith office and after graduating college, she managed the Northwest Arkansas location for a few years. She now works in the corporate office and from operations to sales, she is involved in all areas of the company's operations.

www.ccmarketresearch.com
479-785-5637
corp@ccmar.com

special advertising section

15 TOP HISPANIC RESEARCH COMPANIES

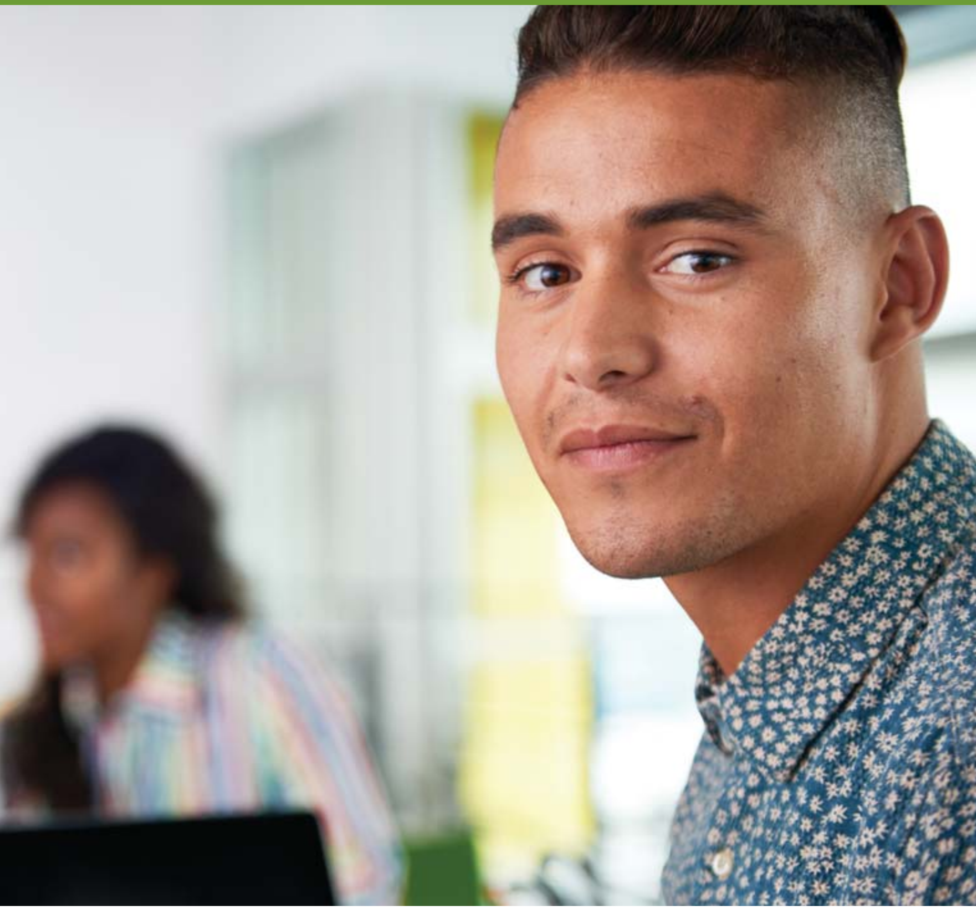
A consumer's cultural and ethnic background helps shape many of their beliefs, opinions and ideas. Making up a large and ever-growing percentage of the U.S. population, Hispanic consumers encompass people from various countries and cultural backgrounds who each hold valuable and insightful information for market research. Companies that specialize in Hispanic research can help uncover insights by providing different multicultural research services. These services include the availability of multilingual researchers and moderators who can help recruit and conduct in-person and other types of research with non-English-speaking consumers, as well as provide access to Hispanic consumers in the United States and in Latin American countries. These specialty research companies understand and can advise on conducting research with consumers from different countries with varying cultural ideas and opinions, providing you with diverse and valuable insights from these unique consumer groups. For assistance in conducting research involving Hispanic consumers, consider these companies.

quirks.com/articles/2017/20170833.aspx

Accurate Market Research

Founded 1999
Karlene Facey, MBA, CEO

Accurate Market Research is a leader in market research to Latin America, North America and the Caribbean. AMR makes use of cutting-edge technology and new market research methodologies. We provide traditional and non-traditional, quantitative and qualitative research, with specialties in online communities, co-creation and other forms of online research methodologies. Whether it is



our large call center and full-service facilities in Mexico and the U.S., proprietary medical and consumer panels or being the leader in telecommunications research, we offer efficient and cost-effective solutions for our clients' needs. We provide services in the health care, automotive and cosmetics industries across 50+ countries.

Phone 561-948-4354 (U.S.); +52-(55)8421-8949 (Mexico)
www.amr-int.com

AmeriSpeak® Panel

(NORC at the University of Chicago)

J. Michael Dennis, AmeriSpeak Executive Director and NORC Senior Vice President

Developed by NORC at the University of Chicago, AmeriSpeak® is a probability-based household panel designed to be representative of the U.S. population. NORC's AmeriSpeak Latino Panel provides a robust, cost-effective, and scientifically rigorous platform for research on U.S. Hispanic and Latino populations. Key features include extensive sample coverage and superior response

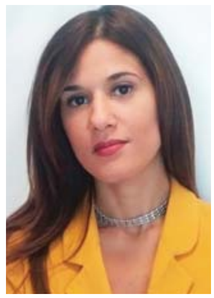
rates. Panelists may take surveys by Web or phone, whichever they prefer; multi-mode panels are far better at representing Hispanic and Latino populations than online-only panels. Our English- and Spanish-speaking panel support team provides strong customer service to our panelists, assures cultural sensitivity and privacy and allows clients to conduct their research in both languages without hassle.

Phone 312-759-5218
amerispeak.norc.org

Asisa Research Group

Founded 1988 | 12 employees
Lilian Pagan, CEO; Claudia Guzman, Research Mgr.

Founded in 1988, Asisa is a full-service marketing research firm with offices in the United States, Central America and the Caribbean. With technological platforms that can help any enterprise achieve their goals without sacrificing rigorous methodological controls and



quality, our agency offers a variety of services for qualitative and quantitative projects. A staff that combines over 60 years of experience, Asisa is led by a group of scholars and young professionals in different areas: marketing, business, technology and psychology. The firm has worked with multinational corporations, governments and social organizations (BID, World Bank, ISSP, ABA, etc.).

Phone 877-333-7939
www.asisaresearch.com

C&C Market Research, Inc.

Founded 1992 | 700 employees
Thomas Morrison, Project Director

C&C Market Research is the complete answer to all your data collection needs. For over 25 years our data collection specialists and field locations, coupled with our proprietary programming and data transmission capabilities, have ensured countless successful projects for all our clients. We are the largest privately-owned and -operated data collection company in the U.S. and have remained a leader in today's marketplace through hard work, ingenuity and a dedication to quality. During that time, we have followed the market demand and strengthened our Hispanic interviewing capabilities across the U.S. We currently have 18 offices in 13 major markets with fully bilingual staff and in many cases bilingual managers. We look forward to helping with your next project.

Phone 479-785-5637
www.ccmarketresearch.com

CASA Demographics

Founded 2005 | 43 employees
Felipe Viyella, CEO

CASA Demographics leverages a national qualitative panel with over 100,000 Hispanics of all acculturation levels and language fluency, providing recruitment, moderation and full-service project management for offline and online qual studies. Recruitment teams in the 18 largest Hispanic metro markets, centralized project management and over a half dozen specialized moderators nationally. Extensive experience in the automotive, CPG, financial services, food & beverage, health care, public affairs, TV/radio and e-commerce fields. Our capacity to organize high-caliber studies and to generate deep insights from consumers has made us the go-to firm for a host of leading brand, advertising and research partners.

Phone 888-503-2170 extension 1
www.casademographics.com

Creative Consumer Research

Founded 1976 | 76 employees
Patricia Pratt, CEO

CCR's mission is to provide clients accurate, actionable information to develop strategic solutions. This includes expertise conducting research among specific consumer targets, such as Hispanic consumers. With the largest Hispanic department in Texas, including bilingual supervisors, interviewers, coders and both male and female moderators, CCR can provide a variety of market research studies focused on this important consumer. Using in-person and telephone interviews, CCR has conducted research projects among Hispanic consumers in the U.S., Mexico, Central America and South America. CCR has experience across multiple industries, including health care, automotive, financial services and consumer goods.

Phone 281-240-9646
www.ccrsurveys.com

Galloway Research Service

Founded 1967 | 40 employees
Elisa D. Galloway, CEO

Galloway Research Service is a nationally-recognized consumer and business insights provider, delivering high-quality survey research services for over 50 years. Our expert team partners with end users and research providers to deliver fast and reliable solutions to their market insights and research project needs across a full range of methodologies, including focus groups, online, telephone and in-person surveys. From data collection through full-service turnkey studies, we tailor our services to achieve survey and market information goals in all types of industries. Our survey expertise includes Hispanic, military, medical, business, consumer, nonprofit, tourism and government markets.

Phone 210-734-4346
www.gallowayresearch.com

Ingenium Research Boutique

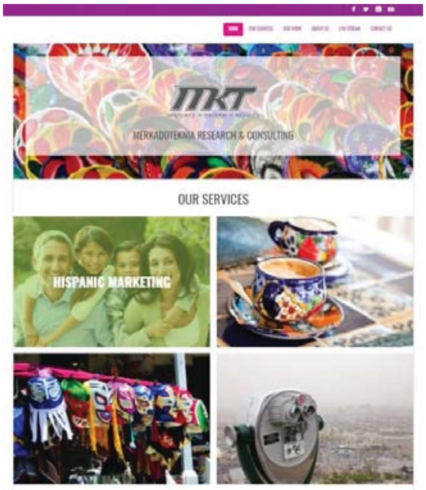
Founded 2010 | 4 employees
Maria Lucia Parra, CEO

Ingenium Research Boutique is a one-stop shop for your total market research projects. We conduct focus groups, in-depth interviews, ethnographic interviews and shop-along interviews. We have the capacity to do it in-person and/or online. We have experience conducting research in the U.S. and Latin America (including Brazil). Our researchers have very strong credentials. They have rigorous training and experienced teams (every researcher has at least 15 years of experience), relevant educational background (psychology, sociology and anthropology), are bilingual in Spanish and English, “immersed” in American and Hispanic cultures and understand differences within countries of origin, across acculturation levels and vs. mainstream.

Phone 407-309-2742 and 914-621-1745
www.ingeniumresearch.com

MerkadoTeknia Research and Consulting LLC

Founded 2011 | 5 employees
Norma A. Mendoza Ph.D., CEO



MerkadoTeknia Research and Consulting empowers clients by providing nationwide recruitment and consulting services on the Hispanic consumer. We manage qualitative and quantitative research projects from start to finish. From advising clients on the best methodologies to crafting strategic insights reports, we provide a one-stop solution to your research needs. We seek to discover unique insights based on our deep understanding of the psychology of the Hispanic consumer. We are driven to efficiently and effectively manage our clients' projects, delivering the highest quality of work. And we are committed to empowering our clients with culturally-relevant knowledge that leads to desired results.

Phone 915-317-9264
www.merkaconsulting.com

Mo'web GmbH

Founded 2004 | 43 employees
Herbert Höckel, CEO

Mo'web utilizes digitalization to make better market research. In its access panels, among 1.5 million respondents worldwide, more than 130,000 consumers and 70,000 B2B respondents are from Hispanic markets. 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

Offerwise

Founded 2004 | 30 employees
Andrew Lissak, CEO

Offerwise is home to the largest and most representative online Hispanic panel in the industry with a focus on the unacculturated/Spanish-speaking segment. All recruitment is done in-house using our proprietary methods, which ensures transparency and consistent quality. Truly a global panel company, we also have expansive panels in all of Latin America. Our offices across the world consist of market research professionals who understand their local cultures and the consumers you want to reach. Talk to our team today and discover the Offerwise difference!

Phone 800-280-4947
www.offerwise.com

Opinion Access Corp.

Founded 1995 | 400+ employees
Lance Hoffman, CEO

Opinion Access Corp. (OAC) is the company that everyone comes to for their Hispanic work – even our competitors, because we've been mastering surveying the U.S. Hispanic market since

1998. Regarded as one of the leaders in the industry, OAC has been providing researchers and consultants with a one-stop shop for all of their data collection and data processing needs for over two decades. Our 350+ CATI interviewing stations alongside our unique online surveying solutions and expert project management enable us to cater to clients with a wide range of varying budgets and goals for both multicultural and general-population work.

Phone 718-729-2728
www.opinionaccess.com

RRU Research – Fusion Focus

Founded 1975 | 25 employees
Maryanne Livia, President

RRU Research has been providing excellence in recruiting and project management nationwide since 1975 and unveiled its NYC research facility, Fusion Focus, in 2013. At RRU, we believe our clients deserve an experience that brings together not only the highest-quality recruiting, project management and service, but is also a visually pleasing and comfortable facility experience that fuses the latest in technology and fine design. We believe these factors combine to give our clients not only the most enjoyable experience but will also produce the most valuable research results.

Phone 718-222-5600
www.rruresearch.com

Spencer Research, Inc.

Founded 1958 | 20+ employees
Adam Weimer, Vice President

Spencer Research provides full-service market research for the CPG industry, specializing in the food and beverage sector. We'll assist you every step of the way from design to execution and data analysis to presentation. With a Ph.D.-level psychologist, a home economist and multiple statisticians on staff, our team will help you evaluate all facets of your research initiative before investing your valuable research dollars. Services include: central location testing; home use testing; designed experiments; discrimination testing; focus groups; research on research; claims tests; and more. Contact us to find out why our personalized services build long-term business relationships.

Phone 614-488-3123
www.spencerresearch.com

Vision Strategy & Insights

Founded 2013 | 7 employees
Michele Cordoba, Brenda Lee, Founding Directors

Vision Strategy and Insights is a full-service research and strategy firm with 20+ years of experience in the development and implementation of actionable research studies among general-market, Hispanic, African-American and Asian consumers. At VSI we take a ground-up approach to every project, led by company principles immersed in every step of development and implementation, assuring best-in-class quality control and delivery of robust and relevant research results. We provide full-service research services across all consumer categories. VSI has developed proprietary techniques including MulticulturalCompass, an approach designed to take into account cultural and category consumption factors unique to multicultural consumers across the acculturation spectrum.

Phone 818-261-8340
www.visionstrategyandinsights.com

Names of Note

In Memoriam...

■ **Allan Orman**, who founded Minneapolis-based firm *Orman Guidance Research Inc.* in 1975, died on May 25 at the age of 85.

■ **Dot Nelems**, who helped launch and establish Norcross, Ga., research firm *Marketing Workshop*, died in June following a long period of illness.

■ In Cherry Hill, N.J., *TD Bank* has named **Barry Baird** as head of customer experience.

■ In Burbank, Calif., **JP Richards** has been promoted to executive vice president, worldwide marketing and chief data strategist, *Warner Bros. Pictures*.

■ *INGATHER Research & Sensory*, Denver, has appointed **Bob Chapin** as CEO and **Carissa Deutscher** as general manager.

■ Sweden-based researcher *Nepa* has appointed **Ken Peterson** as managing director of Nepa USA.

■ *Burke, Inc.*, Cincinnati, has promoted **Joelle Gwinner** and **Thomas Mills** to senior vice president, senior consultant, decision sciences.

■ Columbia, Md., marketing agency *Merkle* has appointed **Alex Yoder** as executive vice president, analytics.

quirks.com/articles/2017/20170813.aspx

■ Madison, Wis., researcher *Digsite* has appointed **Patty Sigler** as consumer insights director.


Frey

■ *MarketVision Research*, Cincinnati, has appointed **Rebecca Frey** as a research associate for the field services team and **Kyle Crockett-Smith** as a research assistant for the information services team.


Crockett-Smith

■ Health care research firm in*Vibe Labs*, Costa Mesa, Calif., has appointed **Sunny Shah** as vice president of insights.

■ *Discovery Communications*, Silver Spring, Md., has named **Christopher McGrath** as senior vice president, data and analytics. McGrath will be based in the New York office.

■ **Charlie Wilton**, partner at Toronto-based research and marketing consultancy *Sklar Wilton & Associates*, has been named a fellow of the Marketing Research and Intelligence Association.


Cunningham

■ Health care research and consulting firm *Research Partnership*, London, has made new appointments: **Anne Cunningham** has joined the firm's European division as a director; **Morten Anderson** has joined the specialist quantitative team as an associate director; and Director **Sue Rees** has joined the specialist emerging markets team.

■ *Forrester Research Inc.*, Cambridge, Mass., has appointed three new members to its board of directors: **Dave Boyce**, senior vice president, product and strategy, InsideSales.com; **Tony Friscia**, independent business consultant; and **Yvonne Wassenaar**, chief operating officer, Airware.


Prunskus


Chow

■ Toronto-based innovation company *Delvinia* has promoted the following within its AskingCanadians team: **Patrick Prunskus** to director of sales; **Theresa Chow** to director of operations; **Bosco Morais** to operations manager; and **Michael Theophile** to senior project manager. **Jaclyn Coker**, Delvinia's finance and administrative coordinator, has also been promoted to manager, finance and administration.

■ *Cadence Research & Consulting*, Thousand Oaks, Calif., has added **Allison Robbins** to its strategy consulting practice as senior director.

■ *Russell Research*, East Rutherford, N.J., has appointed **Eric Hunter** as vice president of corporate strategy.

■ Research services firm *Fieldwork* has promoted **Abby Goodell** to vice president of Fieldwork Network International. Goodell is based out of New York City.

■ *MFour Mobile Research*, Irvine, Calif., has hired **Julie Huang** as tech lead for the labs and engineering team, while **Ana Truong** and **Julian Ramirez** have joined the operations team as research manager and fielding expert, respectively. Also, the firm has hired **Joseph Romano** as a quality assurance engineer, **Jefren Inocando** as a software engineer, **Thomas Lowerre** as quality assurance analyst and **Brian Lee** as software engineer.


De Koning

■ In London, researcher *Lightspeed* has promoted **Leon De Koning** to vice president, client sales EMEA. Additionally, the following have been appointed to lead the firm's new EMEA client verticals: **Matt Shepherd** will transition his responsibilities to lead the Media Client vertical; **Claudia Doeland** will lead the Enterprise vertical; and **Andreas Wittenberg** will focus on supporting the Market Research Agency vertical.


Doeland


Wittenberg

■ Stockholm-based software company *Cint* has expanded its global leadership team and has opened a new office in Hong Kong. The new hires include: **Leandro Margulis**, vice president of strategic partnerships and alliances in San Francisco; **Ronald Leung**, APAC regional vice president of supply; **Heather Hughes**, APAC regional vice president of partnerships and alliances in Hong Kong; and **Diana Dalsgaard-Johansen**, EMEA vice president of partnerships and alliances in London.

■ *Ipsos* Marketing, New York, has appointed **Lakshmi Madabhushi** as chief innovation officer, a newly-created role.

■ *Prosper Insights & Analytics*, Worthington, Ohio, has hired **John Sydnor** as executive vice president and chief operating officer.

■ New York-based company *SIS International Research* has promoted **Mano Keopraseuth** to director of operations, SIS EMEA. The firm has also added **Melanie Neu** as senior project manager, market research, and **Luca Facoetti** as business development director. They will all work out of the London office.

■ **Kara Liebeskind** has joined youth and family research firm *Smarty Pants*, New York, as a manager.


Liebeskind

■ Reston, Va., firm *comScore* has appointed five new members to its board of directors: **Lisa Gersh**, co-founder of Oxygen Media; **Mark Harris**, CFO of Hercules Capital Inc.; **Jacques Kerrest**, CFO of Intelsat; **Joshua Peirez**, president of The Dun & Bradstreet Corporation; and **Susan Riley**, former CFO of several apparel and CPG companies.

■ Research consultancy *Kelton Global*, Los Angeles, has hired **Kurt Munger** as vice president of brand and design.

■ Irvine, Calif., retail technology solutions firm *PriceSpider* has hired **Aaron Weissberger** as vice president of client success and operations.

■ Chicago-based researcher *IRI* has appointed **Nishat Mehta** as president of the IRI Media Center of Excellence.

■ *Complete Research Connection*, Columbus, Ohio, has hired **Lauren Barnett** as a project assistant to support its client services/project management team.

■ Health care communications company *Michael J. Hennessy Associates*, Cranbury, N.J., has hired 26 recent college graduates across multiple departments, including market research and marketing.

■ Research firm *InsightsNow*, Corvallis, Ore., has hired **Karen Lynch** to lead its qualitative and hybrid research program.

■ *Research Now* has hired **Fergus Clarke** as regional director of Southeast Asia. He will be based in the firm's Singapore office.

■ In Prague, social media management platform *Socialbakers* has appointed **Yuval Ben-Itzhak** as its new CEO and **Martin Huml** as its president and COO.

■ Toronto-based researcher *Hotspex* has appointed **Michael Dorr** as managing director of its U.K. business. Dorr is spearheading the firm's U.K. expansion, responsible for building the U.K. business, establishing an office and further building the company's brand in the U.K. and Europe.

■ *Illumination Research*, Cincinnati, has hired **Jim Miller** as VP of quantitative insights and client services.

■ In the U.K., researcher *IRI* has launched a new Growth Solutions team to support the company's clients across five focus areas: media strategy and optimization, shopper marketing effectiveness, price and promotions, in-store activation and range optimization. **Daniel Hunt** has joined IRI to lead the price and promotions practice, while two team members have been appointed from within the business: **Carl Carter** will lead the media practice; and **Matthew Webster** will lead on in-store activation and range optimization.

■ New York marketing technology firm *Tapad* has appointed **Varun Gudiseva** as VP of market development and analytics.

■ Boston-based research and branding consultancy *Protobrand* has appointed **Ryan Baum** as vice president of research design and innovation. Baum will be based in New York City.

■ *The Marketing Research Education Foundation* has appointed two new members to its board of directors: **Carl Rossow**, co-founder and COO of Benenson Strategy Group; and **Charles**

Dodson, director marketing and customer experience, A.M. Todd, WFSI, ADM.

■ **Ivan Pollard** has been named global CMO for Minneapolis-based food company *General Mills*.

■ Data and analytics company *Samba TV*, San Francisco, has appointed **Jen Whalen** as vice president of marketing.

■ U.K. research agency *Join the Dots* has appointed **Leslie Butterfield** as non-executive chair of the board.

Butterfield

■ U.K. research agency *Habit5* has appointed **Hannah Green** as head of insight.

■ San Diego-based polling firm *Competitive Edge Research* has hired **Jenny Holland** as a research analyst.

■ **Julia Mair** has joined insights and analytics firm *Clarivate Analytics*, Philadelphia, as its CMO.

■ *Complete Research Connection*, Columbus, Ohio, has added **Courtney Stewart** and **Hannah Baker** as interns for the summer. The internships are part of the Project Lead the Way STEM Program, which is sponsored by Columbus City Schools.

■ Research firm *Marketing Workshop*, Atlanta, has added **Julia M. Platt** as an intern for the summer.

■ Westport, Conn.-based researcher *Critical Mix* has hired the following: **Courtney Alexander** as customer development associate, Dallas; **Tacie Avedikian** as director, customer development, Clovis, Calif.; **Joe Trapani** as enterprise data architect, Wellington, Fla.; **Kelly Alessandrini** as customer development associate, Perrysburg, Ohio; **Carl Nielson** as director, customer development, Daniel Island, S.C.; and **Mellissa Hill** as director, customer development, Toronto.

■ Omnichannel data company *V12 Data*, Red Bank, N.J., has appointed **Todd Dziedzic** as VP of analytics.

■ Denver-based researcher *GutCheck* has added three new members to its team: **Keith Johnson** as chief product officer; **Shawn Vaughn** as executive vice president of sales and client services; and **Josh Ashton** as vice president of people operations.

■ Boca Raton, Fla., firm *Connected Research & Consulting* has added two new hires: **Sari Kaplan** as director of patient engagement and **Shawn Monroe** as panel and programming manager.

■ Emeryville, Calif., health care analytics firm *MedeAnalytics* has appointed **Paul Kaiser** as CEO.

■ *Research & Marketing Strategies Inc.*, Baldwinsville, N.Y., has appointed **Shannon Beebe** as health care transformation specialist and **Josh Elander** as research associate.

Research Industry News

News notes

■ Paris-based e-commerce software company **PrestaShop** marked its 10th anniversary on June 15.

■ **The Marketing Research Education Foundation** has given a $5,000 grant to **Children of Promise**, a nonprofit in New York that aims to help children of incarcerated parents to break the cycle of inter-generational involvement in the criminal justice system. The grant will be used for Children of Promise's after school program, which provides academic support, hands-on learning, therapeutic services, arts education and physical fitness.

Acquisitions/transactions

■ Minneapolis-based advertising agency **Periscope** has acquired Chicago-based data and analytics firm **Anthem Marketing Solutions**. The Anthem office will become a full-service arm of Periscope. Anthem Founder John Keenan will join Periscope as EVP/marketing analytics and Chris Carroll will be managing director of the Chicago office.

■ Brentwood, Tenn., digital and marketing agency **5by5** has acquired **Sightline Research + Strategies**. Sightline Founder Mark McPeak will join 5by5 as vice president of research and organizational strategy.

quirks.com/articles/2017/20170814.aspx

■ Private equity fund **Stagwell Media LLC** has acquired the Mobile Insights Survey and the Total Communication Survey from New York-based **Nielsen**, which will relaunch as HarrisX, a new market research and consumer experience specialist focused on telecommunications and smartphone customers. HarrisX will join Harris Insights and Analytics, which Stagwell acquired from Nielsen in Jan. 2017. Dritan Nesho has been appointed as CEO of HarrisX.

■ Professional services firm **KPMG Australia** has launched a new specialist customer, brand and marketing advisory venture, led by partner in charge Paul Howes, which has acquired research firm **Acuity Research and Insights**. Amanda Hicks, Acuity's founder, has joined KPMG as a partner, together with her team. The new business will work with U.K.-based customer experience think tank KPMG Nunwood Customer Experience Excellence Centre.

■ New York-based mobile marketing firm **Verve** has acquired German push marketing company **matchinguu GmbH**. Matchinguu's proximity-based push and in-app notification product will be integrated into the Verve Velocity platform, allowing Verve's clients to reach European audiences with mobile advertising experiences that align with the needs and expectations of consumers in the EU.

■ Iselin, N.J., data collection firm **Schlesinger Associates** has acquired **BDI Research** (formerly Block de Ideas), a research services company based in Barcelona, Spain, with a sister research facility in Madrid. Operations will continue under the same brand name and leadership by previous owner, Rosa Dalet. The acquisition adds to Schlesinger's portfolio of acquired offices in the U.K., Germany and France.

Alliances/strategic partnerships

■ In Toronto, market insights firm **Maru/Matchbox** has partnered with the **Canadian Federation of Independent Businesses** (CFIB) to establish the Angus Reid Business Forum, a market research community where CFIB members will be invited to participate in online surveys to provide business-to-business insights.

■ New York-based data management platform **Lotame** has formed a strategic partnership with Stockholm-based software company **Cint**, allowing publishers and advertisers to create custom research panels for audience insights and additional revenue streams. Lotame clients can use Cint's technology to create panels of site visitors to conduct tailored research.

■ Digital incentives company **Rybbon**, McLean, Va., has partnered with survey platform **Qualtrics**, making Rybbon's survey incentives automation available to Qualtrics customers. Researchers can tell Rybbon what reward to send when a person completes a Qualtrics survey and the reward will be automatically presented when the survey is complete. Rewards arrive from the researcher's e-mail address with customized branding.

■ Chicago-based researcher **IRI** has formed a partnership with **Pinterest** to measure advertising campaigns on the platform. IRI Lift for Pinterest, an advertising measurement solution, will help marketers determine the impact of their Pinterest campaign on driving sales and help identify optimization opportunities for sales lift. The solution is expected to launch in Q3 2017.

■ Singapore-based retail solutions

firm **Trax** and **Nielsen**, New York, have formed an alliance to provide the FMCG industry with shelf insights. The alliance, which will first service the U.S. market, will also provide a new joint solution, Shelf Intelligence Suite, which digitizes the shelf and allows brands to have a more frequent and accurate measurement of how their products are represented in-store and how it influences their sales.

■ Lehi, Utah, customer experience software and services firm **MaritzCX** and consulting firm **Protiviti** have aligned to provide companies with a coordinated solution of research, technology and consulting services for the customer experience space.

■ India-based researcher **MRSS India** has formed an alliance with Palo Alto, Calif., data analytics firm **ScoreData** to streamline analytics in customer engagement.

Association/organization news

■ The **QRCA** is accepting applications for its Global Outreach Scholarship for 2018, which aims to involve more international qualitative researchers in opportunities to learn and grow outside their home regions. The deadline for applications is Sept. 8.

■ **The Insights Association**, Washington, D.C., has announced its committee leadership. The committees and their respective chairs include: Jude Olinger for the membership committee; Peter Milla for the standards committee; Rob Stone for the government affairs committee; Reg Baker for the research quality advisory board committee; Ginny Kevorkian and Alice Butler for the chapter committee; Tim Hoskins and Scott Baker for the education committee; and Dave Rothstein for the benchmarking committee. Separately, the Insights Association has launched a new online system allowing participants in the Professional Researcher Certification (PRC) program to manage their activity. The PRC credential is an objective measure of knowledge and proficiency for research and analytics professionals. The new system automatically tracks all aspects of an individual PRC's account, including continuing education credits and an account status that can be reported and managed in real-time.

Awards/rankings

■ **Jim Spaeth**, co-founder of New York brand and media metrics consultancy Sequent Partners, has received the Erwin Ephron Demystification Award from the **Advertising Research Foundation** (ARF). The ARF presented Spaeth with the award at its Audience Measurement Conference.

■ **Dirk Mörsdorf**, global director of Go-to-Market Solutions at Nuremberg, Germany, research company **GfK**, won the 2017 Innovation Prize for his work entitled, "GfK MarketBuilder Voice – Quantitative Concept Tests on the Basis of Verbal Feedback." The award, given by the **Association of German Market and Social Researchers**, recognized GfK's approach that allows new product and service concepts to be tested using an analysis on verbal feedback.

■ Toronto marketing and research consultancy **Sklar Wilton & Associates** was named the No. 1 employee recommended workplace among small private employers by the **Globe and Mail** and **Morneau Shepell**.

■ **The American Marketing Association, Chicago**, and the **American Marketing Association Foundation** have named **Lisa Bowman**, executive vice president and CMO at United Way Worldwide, as the recipient of the 2017 Nonprofit Marketer of the Year Award.

New accounts/projects

■ In New York, radio network **Westwood One** has selected **Nielsen**'s Marketing Cloud and its data management platform, allowing advertisers to make better buying decisions across Westwood One's over-the-air radio and streaming audio channels.

■ **Research & Marketing Strategies Inc.**, Baldwinsville, N.Y., has received final approval from **Centers for Medicare & Medicaid Services** to conduct the Merit-based Incentive Payment System Consumer Assessment of Healthcare Providers and Systems Survey for the 2017 performance period survey administration.

New companies/new divisions/relocations/expansions

■ **MKM Partners**, a Stamford, Conn., equity research, sales and trading firm, is expanding its survey capabilities and is rebranding as **Quantitative Survey Group | QSG**. Continuing to be directed by its Founder Wendy Farina, the team has expanded to include professionals with experience in data analytics, market research and sales.

■ Research firm **Abt Associates** has opened a new office in Baton Rouge, La., managed by Principal Associate Karim Belhadjali.

■ London-based translation and language services firm **GlobaLexicon** has expanded its European Operations Centre in Seville, Spain. Since the beginning of the year, the firm says its team in Spain has more than doubled in size. To support growth, the team recently moved to a larger office in Seville.

■ Research provider **Consumer Opinion Services** has opened a 6,000-square-foot facility located in suburban Seattle, which includes classroom- and theater-style seating, breakout focus rooms and professional AV with videostreaming.

■ **The Bernett Group**, a Boston-based research firm, has opened a new 40-seat call center in Salt Lake City that will deliver phone data collection solutions. Additionally, the company has opened a new office in Austin, Texas, which will focus on growing its integrated survey solutions, including mobile phones, online surveys and custom panels.

■ **CNN International Commercial** (CNNIC), responsible for TV news channel CNN's intercontinental commercial operations, has created a new audiences and data group, which aims to develop audience measurement metrics to replace its research function which has relied on industry surveys for audience insight. CNNIC says the new group, headed by data scientist Mark Sear, will also focus on predictive analytics for audience segmentation and engagement, as well as using artificial intelligence for digital advertising and partnerships and systems integration between CNNIC and brands, tech companies and universities.

■ Seattle-based videoconferencing platform **Discuss.io** has opened its first U.K. office in London, led by Tariq Mirza, managing director, Europe.

■ Stockholm-based research firm **Nepa** has launched its first U.S. office in New York, led by Ken Peterson, who was named managing director, U.S. The firm will initially target retail chains and outlets, with plans to expand to hotels, restaurants, gaming outposts, casinos and sports and entertainment hotspots. Nepa has also been selected by Facebook as a partner firm in Facebook's Marketing Mix Modeling Program, the only such partner firm headquartered outside the U.S.

■ New York-based digital agency **Wunderman** has launched a new division, Wunderman Commerce, with U.K.-based e-commerce consultancy Salmon. The launch allows Wunderman to offer enterprise-level retail and mobile commerce capabilities.

Research company earnings/ financial news

■ Consumer insight app **OnePulse** closed a $2.07 million seed funding round ahead of its summer 2017 launch in the U.S. The investment round was led by U.K.-listed agency network Next 15 and Silicon Valley-based Foundation Capital. The funding comes on top of a previous round of $1.07 million led by Beacon Capital and BBH ZAG.

CALENDAR OF EVENTS

••• can't-miss activities

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

IQPC will hold its CX Week Canada 2017 event on **August 21-24** in **Toronto**. Visit cxweekcanada.iqpc.com.

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.

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.pmrg.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.

The American Statistical Association will hold the 2017 Women in Statistics and Data Science Conference on **October 19-21** in **La Jolla, Calif.** Visit ww2.amstat.org/meetings/wsds/2017/index.cfm.

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.

The New England Insights Association will hold its 2017 Fall Conference on **November 14** at the Conference Center at Waltham Woods in **Waltham, Mass.** Visit newenglandmra.com/event/neia-2017-fall-conference.

MRS will hold its Financial Services Market Research conference on **November 16** in **London**. Visit www.mrs.org.uk.

ESOMAR will hold its Big Data World 2017 event on **November 27-29** in **New York City**. Visit www.esomar.org.

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

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10 minutes with...

Liesbeth Wenzel

Chief Design Researcher, Milwaukee Tool Corporation

"By keeping track of what's coming and making connections across product categories, we can often identify new approaches we hadn't thought of before."

Read the full interview at quirks.com/articles/2017/20170822.aspx.

You received your BA in archaeological studies and a BFA in industrial design. How does this background help you in your role at Milwaukee Tool?

A big part of what we do as researchers is understand the whole context in which a task is being performed. At Milwaukee Tool this means observing the entire construction job site, understanding all the tasks being performed, interviewing all the stakeholders up and down the chain to understand the pressures and motivations for tool choice and behavior, etc. As an archaeologist, I was trained to look critically at the spatial relationships of structures and artifacts on an excavation site and extrapolate what they meant in terms of the culture; this is essentially what I do every day on the job site. As a designer I was trained in design thinking, which to me is essentially the application of critical thinking to the product development process. It helps me bridge the gap between understanding what is going on under the surface of a job site and translating that into actionable insights that our designers and engineers can solve for.

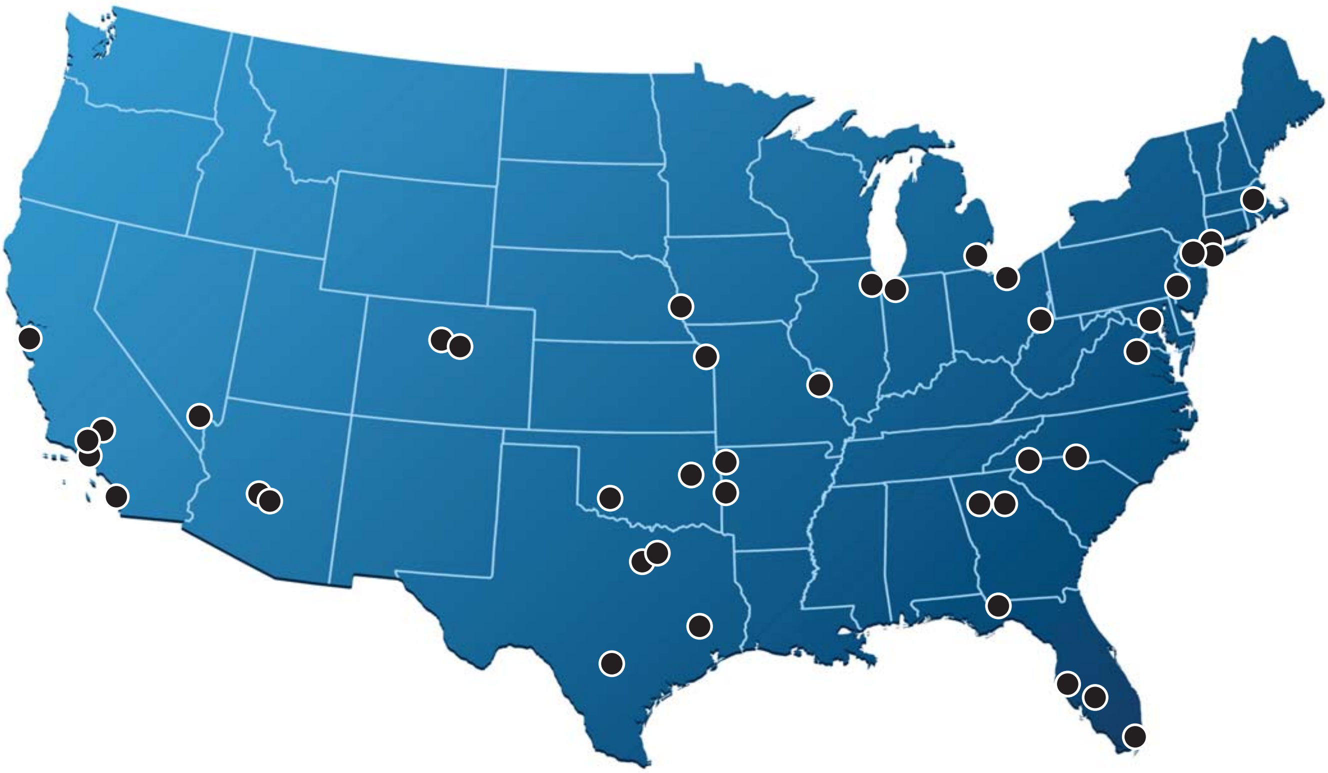
Describe a time when you successfully used the design-thinking framework.

We recently designed a new concrete level at Milwaukee Tool. When we went out to research the topic, we started with very broad questions: "Who uses these tools? What types of applications do they use them on? What do they need to level?" Our research uncovered that many concrete workers use levels in a completely different way than we thought. This allowed us to reframe the project away from designing a specific tool to achieving the multiple jobs that tradespeople use the tool to accomplish. We then followed a typical design process: after ideating on ways to achieve those jobs, we created a range of features and rough mock-ups to communicate the concepts physically. We took those mock-ups back out into the field with the goal not to design the perfect level but to understand which of the needs we identified were most compelling, and to more tightly define design criteria for specific features moving forward. After two rounds of research we had the design intent and user needs well-defined and moved the project into our NPD process. I'm happy to say the preliminary feedback from users has been fantastic: We've designed a tool that matches current behavior in a way that none of our competitors have done. The level will launch this fall.

Beyond MR, what are some of your favorite ways to keep up on consumer trends?

Conferences. Technology is slowly making its way into the construction industry – and there are lots of conferences that showcase what's coming. It's incredibly valuable to attend these shows to see how other companies are approaching the problems we all see on the job site – not just traditional tool companies but companies in parallel spaces as well. One of the challenges in our industry is staying on top of all of the trends in different categories – new products in pipe-fitting, for instance, are addressing completely different needs than those in job-site lighting. Some of the most forward-thinking work comes out of the mining industry and trickles its way down. By keeping track of what's coming and making connections across product categories, we can often identify new approaches we hadn't thought of before.

Market C&C Research



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