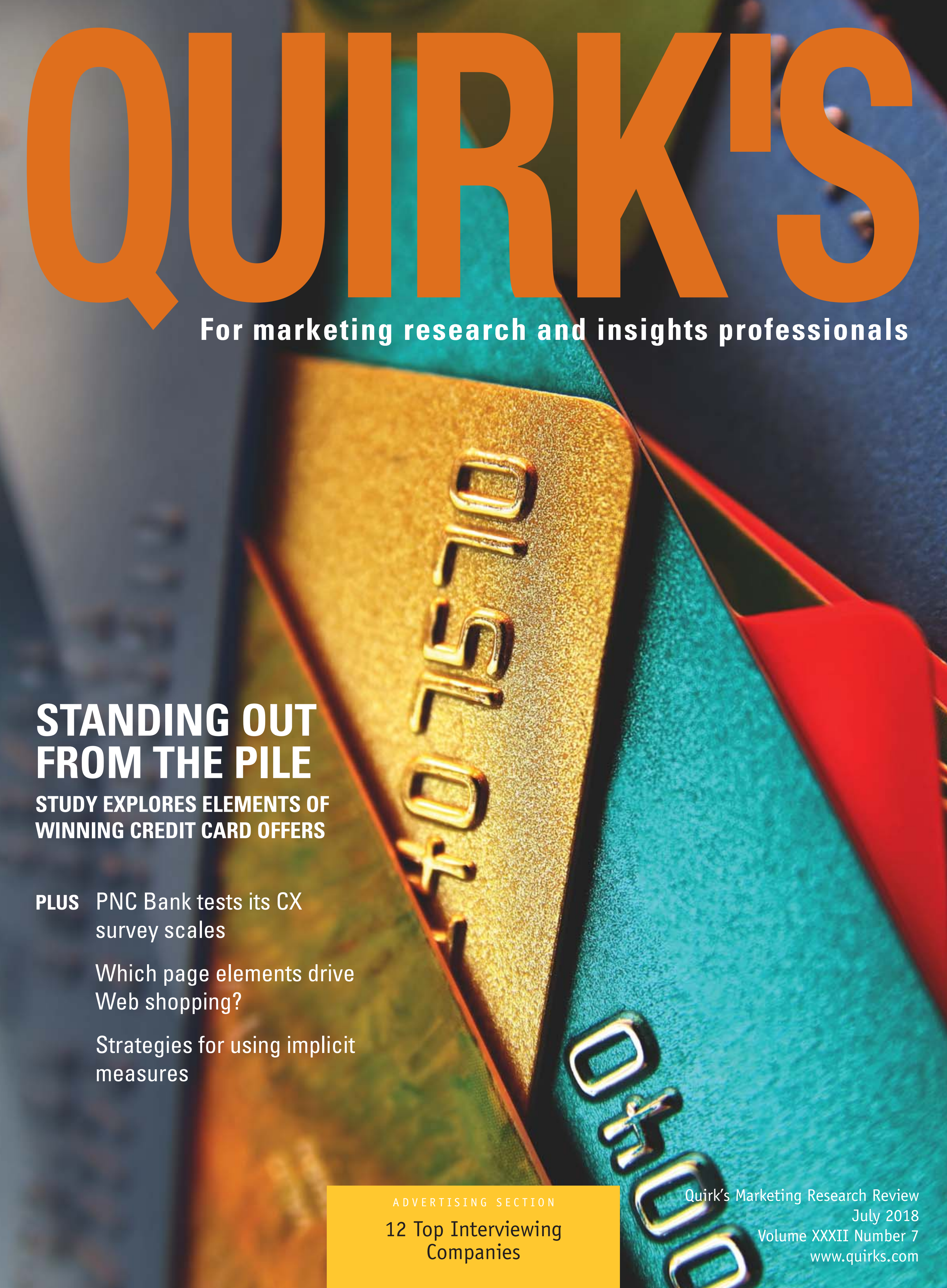

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STANDING OUT FROM THE PILE

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PLUS PNC Bank tests its CX survey scales

Which page elements drive Web shopping?

Strategies for using implicit measures

Quirk's Marketing Research Review
July 2018
Volume XXXII Number 7
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CONTENTS

Quirk's Marketing Research Review
July 2018 • Vol. XXXIII No. 7

DEPARTMENTS

ON THE COVER

TECHNIQUES

COLUMNS

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Searching for an in-depth look at the state of the research industry? Don't miss Quirk's Q Report, published each September alongside the annual Researcher SourceBook. The report covers the results of our corporate research survey and provides a snapshot of the compensation landscape throughout the MR industry. The purpose of the report is to give corporate researchers a look into their world, helping them learn more about what their peers and colleagues are doing and also benchmark themselves and their departments.

••• online tools

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www.quirks.com/articles/2018/20180526-2.aspx

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www.quirks.com/articles/2018/20180525-1.aspx

// Noted Posts

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••• financial services research

One-third claim to have experienced data breach, identity theft

About one-third of U.S. consumers (34 percent) surveyed have been notified at some point that their data has been breached, according to a survey released by The Hartford Steam Boiler Inspection and Insurance Company (HSB), Hartford, Conn., part of Munich Re, and one in five have been the victim of identity theft.

Nearly half of those who had received a breach notification said they had been informed within the past 12 months, according to the findings from the nationwide online survey of 1,551 adults in the U.S. conducted for HSB by Zogby Analytics.

Sixty-two percent of individuals whose personal information had been breached were offered credit monitoring or restoration services and 41 percent took advantage of those benefits.

Asked when they discovered their identity had been stolen, 38 percent said when they applied for credit, were notified of a fraudulent tax filing, were named in a collection agency action over a debt or some other financial or legal transaction. Another 37 percent found out when they received a data breach notification; 20 percent spotted suspicious activity on their credit report, and 4 percent were notified by law enforcement.

Many victims (38 percent) didn't know how their identity was stolen. Twenty-six percent said it was stolen online; 23 percent said it was breached from a bank, retailer or other institution; 8 percent through the loss or theft of a wallet, purse, laptop or smartphone; and 5 percent said a friend or family member.

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••• ad research

Gender equity in ads is good for business

Recent research by the Association of National Advertisers (ANA), in collaboration with TiVo, showed that ads that portray women and girls accurately are more socially acceptable and well-liked by both men and women they surveyed.

Released by the ANA's #SeeHer movement, the findings demonstrate that such ads work even better when paired with programming that also portrays women accurately. When ads that score high in the ANA's Gender Equality Measure (GEM) are aired on high-scoring programs, they deliver better sales than when airing on low-scoring programs.

TiVo conducted analyses using GEM scores across select CPG advertising and the programs they aired within and found that ads with a high GEM score generated double-digit incremental sales per rating point post-ad exposure when they were aired on shows that also have a high GEM score.

To quantify the financial impact when ads and programs are "GEMfit" together, TiVo leveraged its syndicated direct household match of TV set-top box viewership data and shopper loyalty card data. The results confirmed that GEM scores have the potential to make a financial impact when scores are considered in advertising and media planning.


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By Joseph Rydholm, Quirk's Editor

Taking some cues from fellow data-workers

Joe Rydholm can be reached at joe@quirks.com

Though the worlds of data scientists and chief data officers are in many ways only tangentially related to marketing research, some recent reading about the two got me thinking about the roles of language and terminology in MR.

A few years back the folks at Gartner coined the term "citizen data scientist." In a recent blog post ("Citizen data scientists and why they matter"), Gartner's Carlie Idoine notes that the company defines a citizen data scientist as "a person who creates or generates models that use advanced diagnostic analytics or predictive and prescriptive capabilities, but whose primary job function is outside the field of statistics and analytics."

Idoine's post contains a list of the traits of a citizen data scientist. These remind you of anyone else you know?

- possessing a contextualized vision of the organization
- can apply analytic techniques to business problems
- has an appetite for what matters relative to business priorities
- been around the block and has connections
- unique perspective of individual business areas
- able to go to bat to justify business value
- involved hands-on in multiple analytic areas and activities

I'm not suggesting that researchers get new business cards with "citizen data scientist" on them but it struck me how neatly the above also describes the skill set of an effective marketing researcher. And it made me wonder if "data scientist" (citizen or otherwise) might sound more impressive or effective than plain-old "marketing researcher" to an internal partner.

Creating a common language

In his article, "What makes a successful chief data officer?" Raconteur's Rupert Goodwins quotes Nic Orton, chief data officer for LexisNexis Risk Solutions, a data analytics organization, on the role of language and his job. His success, he says, depends on creating a common language for data between business units inside the organization and, beyond that, to customers and partners.

For example, data quality is judged in seven dimensions, including completeness, validity and consistency. "When you see your language being used elsewhere in the organization, it builds confidence that there's clarity across the organization, which means we build trust in ourselves that we are using data correctly," Orton says. "That becomes visible outside the organization and builds trust in relationships."

Are you hearing and seeing your data- and research-related language being used elsewhere in your company? Perhaps your firm has a uniform, well-understood set of terms and constructs for communicating about research but if there are problems, it might be worth looking at the language being employed – by everyone involved. Are internal clients asking for one thing from you and getting another? Might they not be coming to you with their business questions because they don't think answering them is part of your purview, based on your job title or department name?

If you want to drive the narrative and control (or at least influence) how you are seen by your internal audiences, you certainly need to take the lead in determining the language used to describe what you do and the deliverables you provide. That said, I fully understand the enormity of trying to change the culture in an organization of any size, especially the size of some of those where many of you work.

For me, it gets back to Orton's idea of a common language about data between business units and between the organization and its customers and partners. If things are not functioning as smoothly as they might, spend some time looking for disconnects. Because nothing erodes trust like poor communication and, playing off of Orton's point, nothing has the power to build trust and solidify relationships like clarity and shared expectations.

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When does conscious thinking override impulse and emotion?

While humans are often impulsive and emotional, we've identified eight factors that determine when conscious thinking takes more control. For example, people "think" more when they lack ingrained habits or have specific goals (e.g., diet restrictions). Other factors are driven by context during the shopping journey like time to shop or social influences. And, the individual's levels of focused attention and energy play big roles. Given the variability, it's critical to use a tool like Spark MCR™ to capture both conscious and nonconscious reactions.

What kind of data do you get from measuring System 1?

System 1 refers to the automatic processing of stimuli and the spreading activation of neural network associations in the mind. System 1 is fast, automatic and associative in nature. We call this "irrepressible cognition."

In contrast, System 2 is slow, reflective and propositional in nature. System 2 functions on if/then statements and thus is reason-based. Typical survey instruments measure this conscious reflection in response to explicit questions. The type of data that you get is quantitative in nature and typically represents a degree of attitude or perception.

The format of the data that you get from measuring System 1 will look and feel quite similar to what you get from measuring System 2. It is typically transformed into understandable normative scales to ease interpretation. For example, millisecond response time and swipe velocity data following visual primes are commonly reported on an easy-to-understand 0 to 200 scale, where 100 represents neutral and the poles of the scale represent extreme positive or negative associations.

This data is also quantitative and measured at the individual level, which means you can combine it with the conscious data you're already collecting from participants and run your standard statistical analyses.

However, while the form of the data will feel quite familiar, the nature of what the data represents is quite different, and that is where the power lies. When you isolate System 1 processing with a true implicit measure, you're capturing what happens automatically in the consumer mind before the conscious filter kicks in. Thus, you can reveal true feelings, automatic gut-level responses and systematic biases. These unfiltered consumer perceptions and preferences form the foundation for true brand distinction, breakthrough new product concepts and the optimization of marketing messages.

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IN FOCUS

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

// Survey Monitor

••• leisure research

Ranks of avid campers still growing

Increasing popularity among African-Americans

More than 6 million new North American households have adopted the camping lifestyle since 2014, with the number of campers who camp three times or more each year – the most avid group of campers – having increased by 64 percent. This growth, according to the results of the 2018 North American Camping Report, an annual independent study supported by Kampgrounds of America Inc. (KOA), is an indicator that camping is fast becoming a lifestyle attribute among U.S. and Canadian households – and there is no indication this trend is slowing down.

In the U.S. there was an increase of 2.6 million new camper households in 2017. Further, representation among all ethnicities is beginning to appear more like the overall population. Building on 2017 report findings, campers at all experience levels and among all ethnicities continue to express the desire to camp more and are equally likely to say they intend to increase their camping trips in 2018: 45 percent of all campers indicated they will increase camping trips in 2018, an increase of 3 percent from last year's report, while 39 percent of new campers in 2017 will increase camping trips in 2018.

Increases in camping – both in reach and frequency – can be tied to increased accessibility of camping due to the removal of previously held beliefs and barriers. While previous research demonstrated bugs, safety/security and/or campers not knowing anyone who camped as primary barriers to camping, those barriers are waning with technology and social media serving as access portals to helpful information both prior to and during the camping experience. Further, according to campers who say access to cell or Wi-Fi service has a great deal of impact on the length of their trips, they are able to take almost a full week extra of time camping.

"Camping is a highly social activity, and with that, we are seeing campers turning to their social circles or other camping influencers for information and resources, including borrowing or renting RVs and gear. It's this social nature – both on and off the campground – that continues to reduce barriers and fuel the growth of annual camping in North America," says Toby O'Rourke, president of KOA. "With reduced barriers and the desire of campers to connect with nature and each other, it is no surprise that camping is fast becoming a fundamental component of an outdoor lifestyle."

The 2018 North American Camping Report shows campers viewing camping as a time to relax, escape stress and clear their minds. Even with an influx of new campers (both younger and more ethnically diverse), differences in opinion about the reasons for camping are beginning to lessen, with close to half of all campers suggesting that camping has "a great deal of impact" on reducing stress and allowing them to spend more time with their families. There is also increased recognition that camping contributes to emotional and physical health.

Camping continues to grow in the U.S. and the future of camping is strong. Overall camping incidence remains stable with 61 percent of U.S. households (77 million) having someone who camps at least occasionally, a minor increase over last year. Forty-five percent of all campers indicated they will increase camping trips in 2018, while 39 percent of new campers in 2017

www.quirks.com/articles/2018/20180703.aspx

will increase camping trips in 2018.

As first noted last year, teen campers continue to be highly engaged in camping and demonstrate a great deal of enthusiasm toward camping and the outdoors. Teen campers express higher levels of enthusiasm toward camping than what adults predict; 94 percent of teens state they are enthusiastic about camping, compared to 77 percent of adults who say that teens are enthusiastic. Nearly all of the teen campers surveyed claim they intend to camp as adults and if they have children, they intend to bring them camping. In fact, most teen campers identify a benefit of camping as relaxing the adults in their lives (as well as themselves).

Further, new campers in 2017 are more diverse than the overall population with a nearly even split between white and non-white campers. The representation of Hispanic and African-American/black new campers is in line with U.S. Census figures, while new Asian-American campers are represented at three times that of U.S. Census figures (new Asian-American campers represented 17 percent of new campers in 2017, against 5 percent from Census data). African-American/black campers are most likely to report an increase in camping, while Asian-Americans are most likely to say that their camping will remain consistent year over year.

Those who serve the outdoor hospitality sector should plan on higher levels of camping across the board but primarily among younger campers, who may drive the camping economy as they experiment with different types of accommodations and camping.

Six out of every 10 Millennial households tried some type of camping or lodging in 2017 but the experimenting is being driven by Hispanics (71 percent) and African-Americans (78 percent) trying out new ways of camping.

Nearly all Millennials (93 percent) and Gen Xers (93 percent) would like to try some type of new camping in 2018. Millennials are the most likely to want to experience backcountry camping and/or glamping, while Gen Xers seek unique accommodations.

Both Millennials (66 percent) and Gen Xers (58 percent) are changing their camping habits and included both more weekends and weekdays in their trips this past year.

Access to technology while camping is helping to eliminate barriers to getting outdoors. A past determinant of camping has been not having access to informa-

••• brand research

Consumers wary of influencer marketing

Got to be real

Brands spent an estimated $2 billion on influencer marketing in 2017 but nearly one-quarter of influencer marketing dollars are being wasted on inauthentic content that today's savvy consumers don't trust, according to new research by Minneapolis ad agency Carmichael Lynch.

According to the study, The Truth About Influencer Marketing, more than a third of women (35 percent) think influencers are dishonest when content is sponsored. However, many influencers surveyed are unaware of this consumer skepticism. More than four in five influencers said their audience considers brand-sponsored content "about the same" as their regular content, and only 1 percent of influencers said their audience responds negatively toward brand-sponsored content.

Even more troublesome for an industry built on trust, 23 percent of influencers surveyed don't feel they're able to be authentic with brand-sponsored content. When asked about challenges in working with a brand, 70 percent said a top challenge is the "lack of creative freedom," but more alarming are the findings that 45 percent said "brands don't understand my audience." Even more concerning, 15 percent said "I don't like the brand," begging the question why they partnered in the first place.

"Consumers look to influencers for honest opinions and it's this trusted relationship that sets influencers apart from ads – it's word-of-mouth at scale. But trust in the industry has eroded through some high-profile missteps," says Emily Buchanan, executive vice president, Carmichael Lynch Relate. "Influencer marketing is in a position to thrive but the industry must drive meaningful change and regain consumer trust."

2018 influencer partnerships survey methodology: In October 2017, Carmichael Lynch Inc., via Toluna, conducted an online survey of 121 influencers (bloggers, vloggers and content creators) who regularly partner with brands, in order to determine their perceptions toward sponsored content.

2018 sponsored content survey methodology: In December 2017, Carmichael Lynch Inc., via Toluna QuickSurveys, conducted an online survey of 1,058 consumers to determine who consumes influencer content (which includes things such as a blog post, video, podcast and social media post), to understand their perceptions of sponsored content and to compare their attitudes against the influencer survey. Of the adults who participated in the survey, 561 reported that they consume influencer content. Data is reported at a statistical significance of 95 percent and above.

tion about some of the issues that may have hindered camping in the past, such as safety and security. These issues can now be addressed with social media networks and searching the Internet, putting information at the prospective camper's fingertips. Nearly all campers (97 percent) state that they bring some type of technology with them while camping. In a continued upward trend since 2014, campers are significantly more likely to go online while camping. Yet, in a departure from the results observed last year, campers are significantly more likely to say that the use of technology detracts from the overall enjoyment of their camping experiences (38 percent in 2016, 49 percent in 2017).

What's more, the idea of unplugging while camping is in fact unlikely to mean a complete disconnect from technology. About a third of all campers say they have their smartphone with them but they don't turn it on (used for safety only). The use of social media to share photos and videos while camping continues to grow, with 27 percent of Millennials and 25 percent of Gen X campers surveyed saying that sharing camping experiences through social media is important (compared to 24 percent of all campers). Millennial families are more likely than other Millennials to post a status update via social media (40 percent), check-in (40 percent) and share photos or videos (68 percent) while camping.

Tent usage remains consistent and the highest camping accommodation with 61 percent of campers identifying tents as their primary way of camping; about one-fourth (24 percent) of all campers use an RV as their primary way of camping. Among campers who claim an RV as their primary way of camping, 44 percent do not own the RV they use most. A full one-fourth of this subset of campers say they borrow the RV, and one-in-five say they rent from a company or peer-to-peer rental service. Borrowing an RV is most common among Gen Xers. Among Millennials, those with families are most likely to consider renting an RV from a peer-to-peer service (followed by Millennial couples). The largest growth in RV usage is among African-American campers, with 27 percent stating that an RV is their primary way of camping, which is up from 19 percent last year. Forty-one percent of African-American campers state they tried an RV for the first time in 2017.

U.S. and Canadian household results: This survey was conducted in January 2018 by Cairn Consulting Group. The sampling methodology targeted a randomly selected sample of U.S. and Canadian households. Sampling was designed to obtain n=2,903 completed survey among representative U.S. households and representative Canadian households. A sample of n=2,402 U.S. households is associated with a margin of error of +/- 1.99 percent. Among Canadian households, a sample of n=501 is associated with a margin of error of +/- 4.37 percent.

Teen survey results: The results are based on a total of 403 surveys completed among a random sample of U.S. households with children between the ages of 13 and 17. Each survey was completed with a teen respondent whose parents gave prior permission. A sample of n=403 teen campers is associated with a margin of error of +/- 4.9 percent.

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

••• shopper insights

In-store shoppers happy to go it alone

Self-service over associates

Ninety-five percent of consumers want to be left alone while shopping unless they need a store associate's help, according to a new consumer survey by HRC Retail Advisory, Northbrook, Ill. According to the survey, many shoppers are moving away from the hands-on, personalized service from store associates and instead turning to their friends and family via social media to share pictures and gather opinions before they buy, particularly in apparel.

To better understand what drives shoppers into stores, and what they like to see when they get there, HRC polled 2,900 North American consumers about their shopping habits and preferences, revealing that a majority of shoppers are looking to in-store technology for customer service.

In fact, approximately 85 percent of consumers surveyed want to be able to check prices at price scanners throughout a store rather than having to ask a sales associate for pricing information. Further, 69 percent of shoppers said that being able to order a technology product online and then pick it up in store is important (likely where they can see it and test it before buying), with a similar 65 percent saying it is important for apparel.

Conversely, while the need for store associates is diminishing overall, nearly 52 percent of all respondents said that an in-store personal shopper who helps them choose products is important when shopping for technology items. However, most respondents still preferred technology over personal service, as a much higher 76 percent of overall respondents rated an in-store app that will provide personal recommendations as important.

Consumers surveyed showed less enthusiasm about several of the popular technology innovations and in-store experiences that many retailers are offering. Technology in apparel-store dressing rooms that assists with shopping was deemed important by only 17 percent of those surveyed. And only 6 percent of respondents ranked customized lighting in dressing rooms as important when shopping for apparel and shoes. Mobile payments ranked only slightly higher, with about 8 percent of those polled saying that having the option to pay via a mobile app was important to them. Only 19 percent of respondents overall said that retailers' special events designed to create communities were an important part of a store's offering, particularly when shopping for apparel and beauty products. Events may grow in importance in years to come, however, as a slightly higher 24 percent of Generation Z listed them as an important store feature.

Across all consumers surveyed, in-store environment ranked as the most important factor while shopping (53 percent). The survey identified additional key environmental factors that shoppers also value in-store:

Mobile promotions and sales. Nearly 34 percent of all respondents ranked receiving promotional and sales information sent directly to their smartphone upon entering the store as important.

Mobile point-of-sale. Nearly 30 percent of respondents said that being able to pay a sales associate from anywhere in the store was important, an indication that digital scanning technologies will play a growing role in retail.

Social media. Nearly 70 percent of Generation Z and 63 percent of Millennial respondents are turning to social media to share pictures and gather opinions from their friends and family before they buy, particularly in apparel.

Wi-Fi. Free in-store Wi-Fi was ranked as important by 30 percent of respondents overall and the rate was higher among younger generations, who tend to seek opinions from their social networks and share photos via social media when they shop.

In-store apps. About 29 percent of overall respondents ranked in-store apps that would provide personal recommendations as an important store feature, versus only 17 percent who ranked sales associates that would help you choose as important.

Reserve online, pick up in-store. Being able to reserve apparel online and try it on in-store before purchasing was ranked as important for 42 percent of Millennials and 38 percent for Generation Z.

HRC Retail Advisory's survey was conducted online February 20-March 7, 2018. The total sample size was 2,903 U.S. and Canadian consumers ages 10-73 (with those ages 10-17 recruited to participate through their parents).

••• travel/b2b research

Room for some change

Exec travel programs outsourcing hotel procurement

A study, A New Horizon in Hotel Sourcing, found that change is in the air for travel executives: More than half (51 percent) of corporate travel programs have made some change in their approach to hotel sourcing in the past three years – with the vast majority saying they have derived savings from a new direction.

The study, conducted by Alexandria, Va.-based ACTE Global (Association for Corporate Travel Executives) and underwritten by travel agency HRS, focused on how corporate hotel procurement practices are evolving.

Driven by multiple pressure points, including rising hotel rates, a fragmented hotel marketplace and the amount of time that traditional hotel sourcing takes, 48 percent of travel managers who made a change decided to outsource some or all of their hotel procurement to either a global hotel services provider or a third-party specialist.

The research reveals several other trends that point to a shift in how companies – particularly larger, multinational programs – approach hotel supplier negotiations. Companies working with a global hotel services provider or a consultancy report annual savings of 7 percent, while those working with a travel management company reported saving 4 percent per year. Approximately one in 10 programs (11 percent) report implementing continuous sourcing – a relatively new practice that sources hotels year-round, as opposed to during a limited RFP process at the end of each year. These companies report positive changes, including improved traveler compliance and satisfaction, financial savings and increased portfolio flexibility.

One of the primary barriers to continuous sourcing adoption is education: 42 percent of travel executives who have not implemented continuous sourcing are not familiar with it. About one-third (31 percent) cite lack of time or resources.

One-fifth of travel executives report that they do not stay abreast of business changes that could impact their hotel programs, such as an emerging need in a new geographical market, unless it's RFP season. This suggests that, for the remaining executives who do monitor throughout the year, continuous sourcing may help them act on business shifts more quickly.

ACTE members around the world (Americas, 38 percent; EMEA, 38 percent; APAC, 24 percent) were polled electronically from February 20 to March 5, 2018, about strategies and challenges in the hotel sourcing process. A total of 226 executives responded to the survey, which was conducted by research firm Rockbridge Associates.

IN FOCUS

Product and Service Update

••• ad research

Research Now SSI adds to ADimension

Cross-Media Dashboard

Research Now SSI now offers the Cross-Media Dashboard, an advertising measurement tool. The latest feature of Research Now SSI's ADimension Ad Effectiveness platform solution, the dashboard includes reporting on consumer engagement and exposure in channels such as linear TV, addressable TV, over-the-top content distribution, print, radio, in-app and out-of-home ads such as stadium screens. ADimension links impression data to individuals via Research Now SSI's opted-in research panel. ADimension measures brand metrics – awareness, familiarity, favorability and purchase intent. It supports advertisers, media and advertising agencies, market research agencies and publishers from audience discovery to creative testing, ad implementation and optimization and evaluation.
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••• shopper insights

Report profiles C-store shopper

Why they choose where they choose

Dallas loyalty marketing firm Excentus has released The C-Store Shopper Profile, a report on convenience store shoppers that examines the interests and behaviors of over 1,000 American consumers through data gathered from a recent Excentus-Ipsos survey. It provides convenience retailers with insights on: loyalty shopper demographics including gender, age, marital status, education, income and in-store spend; the top reasons why customers choose to shop at a specific convenience store; the factors that influence shopping behaviors and decisions on where customers shop; and incentives convenience retail operators should consider offering and the platforms through which they should offer them. The report is available for download at http://excentus.com/c-store-shopper-profile (registration required).

••• data analysis

Mixed-methods tool updated

New version of NVivo12

Data analysis software firm QSR International, Boston, has launched NVivo 12, the latest version of its mixed-methods research tool used by education, health care, marketing and nonprofit researchers. NVivo software supports qualitative and mixed-methods research and is designed to help researchers organize, evaluate and find insights in unstructured or qualitative data, including interviews, open-ended survey responses, articles, social media and Web content. The new version includes: more visualization options; more automated analysis options; more customizable options and user controls; integration with IBM SPSS quantitative data analysis software for an improved mixed-methods research experience; support to work with and analyze a range of qualitative data – video, social media content, e-mail content, Web content and OneNote and Evernote files; improved loading response times when selecting project items on a new session and when loading list views on start-up of an NVivo project.
www.qsrinternational.com

••• brand research

App delivers video responses

Gauges emotional reactions

Artificial intelligence (AI) company Truthify now offers an eponymous short-form video messaging app to help brands, marketers, media and advertising agencies and political campaigns gather at-scale audience feedback. Users upload their message or content to Truthify and the recipient watches the video message after enabling camera permissions and the app uses AI to identify the recipient's subconscious emotional reactions to the sender's message and shares the reactions with both the sender and recipient. Results within the app can be filtered by an aggregate or individual recipient comments, emotions and more. Users are also granted analytics that offer details about their content, such as recipient demographics, the specific point at which a recipient's emotion changed and the device and operating system used to view the content.
www.truthify.com

••• ad research

Tool measures digital ad effectiveness

Incorporates online community

Westport, Conn., insights company Critical Mix has launched ADvance, a digital ad effectiveness measurement tool designed to help market researchers and digital marketers maximize ad campaign performance. The solution leverages Critical Mix's global online survey community combined with customized technological methods to collect and analyze results of digital advertising campaigns in real-time. In addition to ADvance providing campaign and survey analytics, added behavioral insights on exposed and control panelists are available through the company's partnership with InfoGroup. InfoGroup's data set provides access to up to 900-plus data elements on panel members for further analysis on factors of campaign results.
www.criticalmix.com/advance

••• Briefly

■ New York-based researcher Ipsos has launched a new Product Intelligence solution to enable marketers to evaluate products faster and more efficiently. Using online user ratings and reviews, the approach gathers consumer feedback on in-market products and uses a product testing lens to analyze the social data. The approach uses text analytics, augmented by human intelligence, to provide product performance insights based on unfiltered consumer feedback.
www.ipsos.com

■ Copenhagen, Denmark, software firm OfficeReports ApS has released Version 8 of its OfficeReports Analytics, a data analysis and crosstab tool add-in for Microsoft Excel. The new version treats all tables created using OfficeReports as pivot tables. A pane on the side lets users change the variables and filters. Researchers can show both count and percent and the new version supports weighting, nets and T-tests and Z-tests for two significance levels at the same time. It can also show other statistics like medians.
www.officereports.com

■ U.K.-based video insight firm Voxpopme now offers VideoCX, a video-first customer experience platform. Customers can leave a short video along with their NPS, cSAT or CES score and videos collected are then processed by Voxpopme's analytics engine with transcription, sentiment and theme-coding made available through a dashboard where showreels of key insights can be created and shared across the organization.
www.voxpopme.com

■ P\S\L Group has introduced Assure BrandPanels to address fraud in pharmaceutical market research, as highlighted by the German news organization *Der Spiegel*. During an investigation encompassing 600 market research studies, including those containing physicians, *Der Spiegel* uncovered manipulation in the industry leading to fraudulent data. Assure BrandPanels is designed to apply artificial intelligence and machine learning to uncover and prevent bad actors from infiltrating research samples.
www.pslgroup.com

■ Slovakia telecommunications firm Swan announced it is testing a new system for consumer surveys over its TV platform. The service was developed with the startup Prieskumy and will deploy computer-assisted TV interviewing technology. The system allows public authorities or consumer researchers to question people at home, over their TV interface. Swan counts over 24,000 TV subscribers in Slovakia.

■ Ipsos Healthcare, the health care business of Paris-based researcher Ipsos, has announced the launch of its syndicated multiple sclerosis patient community panel.
www.ipsos.com

■ Maritz has established PeopleScience, a forum dedicated to advancing the conversation about applied behavioral science within business and industry. Its primary content engine, PeopleScience.com, will bring together thought leaders from academia, business, public policy, journalism and related spheres of influence. Among those supplying content will be Dan Ariely, author and professor of psychology and behavioral economics, Duke University; Om Marwah, global head of behavioral science, Walmart; and Matt Wallaert, chief behavioral officer, Clover Health.
www.maritz.com

■ New York-based Nielsen announced the commercial availability of its Enterprise Audience API, which is designed to help media clients and their solution providers accelerate their TV audience targeting initiatives. Through the new API, clients can transact on advertiser-defined audiences including but not limited to those based on credit card spending habits, in-store FMCG purchases and extended psychographic profiles. As additional data sets emerge, the platform allows for expansion to include new targeting capabilities. The API also supports standardized segments curated by industry groups such as the Advanced Target Standards Group.
www.nielsen.com

■ Oslo, Norway-based Confirmit has launched Confirmit Employee Pulse, an employee research offering designed to help businesses run flexible employee listening programs using a tool that supports any type of feedback, from company-wide surveys to ad-hoc programs that identify and address specific local issues.
www.confirmit.com

■ Gary King, founder and chair of the board of Boston firm Crimson Hexagon, has developed a model between independent academic researchers and Facebook to better understand the implications of social media and digital technologies in the world, starting with the impact of social media on elections and democracy. King's model will enable trusted academics to gain access to privacy-protected Facebook data to understand Facebook's impact on upcoming elections in Mexico, India and the U.S.

■ Ipsos Healthcare has expanded its syndicated Pan-Cancer Testing Monitor (PCTM) to the Australian market. The PCTM, which has been running in the U.S. since 2016, measures and tracks the usage of pan-cancer tests, which are designed to test for a wide range of cancer types to help doctors make more informed treatment decisions. The study gathers perceptions from medical oncologists and pathologists on topics such as awareness and current utilization of pan-cancer tests, perceived advantages and disadvantages and drivers and barriers to use.
www.ipsos.com

■ Dallas-based sensory testing firm Curion has opened a new testing and sensory facility in Irving, Texas, featuring a kitchen area with a 20-foot commercial hood, both gas and electric ovens and burners, walk-in cooler and freezer, and a focus group room.
www.curioninsights.com

■ Mobile survey software firm One-Point Global has launched a free market research toolkit combining several of its core products including its SMS Invitations product and a survey app. Separately, the firm has added optical character recognition to its My Surveys app. The new feature reads text within images and can trigger new surveys or question sets based on keywords within receipts or product labels. The text can be stored more efficiently than image files and can be extracted for further processing or analysis, delivering granular data about when, where and by whom products are being purchased.
www.onepointglobal.com

■ MFour Mobile Research, Irvine, Calif., now offers the Path-2-Purchase Platform, a first-party data platform that enables brands to see where consumers are now and where they've gone in the past. Instead of receiving tracking data showing consumers' whereabouts, Path-2-Purchase users can field real-time, location-based surveys to capture motivations and emotions at any point in the purchase cycle.
https://mfour.com

■ Chicago-based IRI has implemented artificial intelligence (AI) and machine learning enhancements to its offerings to improve the analytics solutions it provides clients. IRI is applying AI and machine learning algorithms across its Liquid Data technology platform with a number of solutions, including IRI Demand Forecasting and IRI Revenue Management Solutions.
www.iriworldwide.com

■ The NPD Group, Port Washington, N.Y., has launched U.S. Kids License Tracker, a service providing a holistic view of licensed purchases in the U.S. spanning 17 industries, from sporting goods to footwear, for kids ages 14 and under.
www.npd.com

■ Los Angeles-based research platform Fuel Cycle has launched Fuel Cycle Exchange (FCX), which aggregates insights tools to help customers centralize their research activities on a single platform to support product development, shopper insights, customer experience, pricing, marketing and more.
www.fuelcycle.com

■ Research firm MESH Experience has launched its first annual experience landscape report for the retail bank sector. For the last year, MESH has been building a new Real-time Experience Tracking subscription datastream for the retail banking sector. A number of U.K. banks have now signed up for 2018 tracking. The report covers all touchpoints – paid, owned and earned experiences, from TV to online to word of mouth – across major banking brands and includes qualitative diagnostics.
www.meshexperience.com

■ Atlanta-based ZAPTEST has launched Script-Less test automation technology, designed to help QA professionals automate test procedures with no use of programming language scripting. ZAPTEST offers the ability to automate any UI operation on Windows, iOS, Android, Mac and Linux to auto-generate test documentation and to execute the same test across multiple environments in parallel.
www.zaptest.com

■ Northampton, Mass., software firm OriginLab has released Origin and OriginPro 2018b, adding new features, apps and improvements to enhance Origin's graphing, analysis and programming capabilities.
www.originlab.com

■ The Fairfax, Va.-based Culture Marketing Council: The Voice of Hispanic Marketing is offering a free download of its 2018 Hispanic Market Guide at www.culturemarketingcouncil.org. The digital guide identifies companies with culture specialists along with their capabilities, client roster and key contacts.

■ Reston, Va.-based research firm comScore now offers new Advanced Audience segments to its digital audience measurement solution, Media Metrix Multi-Platform, including IAB, OTT and TV viewing segments to allow media buyers and sellers to understand multi-platform audiences beyond age and gender.
www.comscore.com

■ ZimGo Polling, South Korea-based BPU International's new SaaS election analytics product, is now available. This is the first election analytics AI cloud-computing tool to utilize the patent-pending Artificial Emotional Intelligence (AEI) ZimGo engine. ZimGo Polling aims to reduce margin of error and lower human bias.
www.bpuholdings.com

■ Research firm N-equals Vietnam, Ho Chi Minh City, has unveiled a new focus group facility with seating for up to 12 adults and full recording and Internet streaming capabilities and also doubled the size of its CLT facilities.
n-equals.com

■ London-based location data company Blis has upgraded its Smart Trends analytics tool, adding new capabilities to allow marketers to build intelligence from refined movement data analysis across various verticals.
blis.com

■ Bend, Ore.-based consulting firm Luck Collective has launched a new offering called The Growth Collective, designed to help small groups of entrepreneurs, curated by growth stage and revenue goals, uncover opportunities and maximize growth. Participants are grouped with other founders in related but non-competitive businesses to help foster business success.
www.luckcollective.com

■ Vernon Research Group, Cedar Rapids, Iowa, now offers its Insightaneous research service, which is designed to provide focused data on a few questions with a fast turnaround. Companies or organizations can ask four questions and receive a report with the overall results plus three demographic data cuts of their choice within three to five business days. Guidance on survey methodology and question design is included. Users can also specify genders or age group quotas. The sample size is typically 500. Larger samples are available for regional and national projects.
www.vernonresearchgroup.com

■ Toronto data collection firm Delvinia has launched its new automated marketing research platform Methodify across North America. The platform employs research methods to test consumers' feedback in a range of instances, from product concepts and pricing strategies to advertising campaigns and user experiences. Featured research partners include Kantar, element54 and Voxpopme.
www.delvinia.com

■ Research software firm Confirmit has launched Confirmit Account Health, a new solution designed to help stakeholders in B2B organizations understand the health of their account portfolios and manage revenue risks from the frontline through to executive management.
www.confirmit.com

■ U.K.-based cross-media measurement firm RealityMine has added RealLife Profiles to its data product offerings. The RealLife Profiles product provides a daily summary on panelists, of apps used and of top-level Web sites visited within a day, providing a snapshot of passively-metered data on each panelist. This allows panel owners to profile or improve targeting on sample and to complement survey responses. RealLife Profiles is tailored for panel integration and covers panelists using Android and iOS devices.
www.realitymine.com

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How good is best-worst scaling?

| By Bryan Orme

snapshot

Bryan Orme looks at best-worst scaling and shows that it's more than just rank-order data.

Researchers often are asked to measure the preference or importance of items such as product features, claims, packaging styles or health risks. Popular approaches include rating scales, constant-sum tasks and best-worst scaling (max-diff).

The standard five- and 10-point rating scales are fast and easy but are plagued by low discrimination among items and scale-use bias. With rating scales, a much more important item won't necessarily get a much larger score. Respondents are tempted to yea-say (positivity bias) and straightline. Different cultural backgrounds can influence the way respondents use the scale. When comparing groups of respondents, many true differences may be obscured due to the messiness and bias in rating scale data.

With constant-sum tasks, respondents are asked to distribute (say) 100 points across multiple items. Many respondents struggle with this task and the results can be noisy and imprecise. Constant-sum tasks are also difficult for respondents to do with more than about 10 items.

Best-worst scaling (BWS) shows sets of items, typically four or five at a time (Figure 1), asking for each set which item is the best and worst (or most and least important) (Louviere 1991, Finn and Louviere 1992, Louviere et al. 2015). It is typical to show each respondent eight to 15 BWS sets, such that each item appears at least once and preferably two or three times per respondent in a balanced design. Often 20 or more items are included in a BWS study.

www.quirks.com/articles/2018/20180715.aspx

BWS scores show greater differences among the items and the results are more predictively accurate of held-out information (Cohen and Orme 2004, Chrzan and Golovashkina 2006). You will find a greater number of statistically significant differences among the items and between the respondents (Cohen and Orme 2004). As a result, with BWS you can use smaller sample sizes and obtain equally good estimates as the competing methods.

The main drawback for BWS is that it can take about triple the time for respondents to do than rating scales. But given the way respondents often rush through ratings grids and tend to yea-say and straightline, having respondents slow down and provide better data seems like a good thing for the conscientious researcher to do.

Might be a much greater difference

We have seen false claims that best-worst scaling data yield nothing more than rank-order information. The argument is as follows: assume respondents use BWS to evaluate items that have an established preference order. In each set, if respondents pick the true best and worst items without error there is no way to learn that there might be a much greater difference in metric preference score between the first and second vs. the second and third items, etc.

The fallacy in the above narrative is the false assertion that respondents answer like robots, mechanically selecting the true best and worst items in each BWS set. Researchers typically study complicated constructs such as importance or preference and humans don't have a

Figure 1

Think about what makes you choose one restaurant or another. Considering only these 4 features, which is the Most Important and which is the Least Important?

Most Important		Least Important
◯	Restaurant donates generously to charities	◯
◯	Food tastes wonderful	◯
◯	Restaurant is close to your home	◯
◯	Clean eating area	◯

fixed list of scores that they somehow pull out of their brains to reference as they answer BWS questions. Their answers are subject to inconsistencies (errors). Imagine Objects A and B are clearly different for a respondent but Objects C and D are extremely close. It's likely that each time the respondent compares A and B in a set, she picks A over B. But, that same respondent might not be consistent over multiple sets regarding the order of C and D because of how nearly identical they are in her mind.

Using robotic respondents programmed to act like imperfect humans (let's call them artificial respondents), we can demonstrate that BWS can capture more than just rank-order scaled preferences: it can accurately recover the relative metric differences among the items. Consider a nine-item BWS study where the true utilities follow non-equal step sizes (Table 1).

Table 1

Utilities for Artificial Respondents

Item #	True Utilities	N=750 Estimated
1	5.00	5.03
2	4.10	4.14
3	3.90	3.91
4	3.00	3.03
5	2.10	2.09
6	1.90	1.90
7	1.50	1.60
8	1.00	1.07
9	0.00	0.00

We generated a BWS questionnaire and programmed human-imitating bots to answer according to the true utilities in Table 1, subject to the typical level of response error expected from humans with distributional properties consistent with logit estimation. In Table 1, we also show the estimated scores for these 750 artificial respondents and they very closely fit the irregular utility intervals between adjacent items in this study. BWS has yielded metric information beyond just rank-order scaling. Given enough artificial respondent bots, we can make the estimated utilities perfectly match the true utilities to as many decimal places of precision as desired.

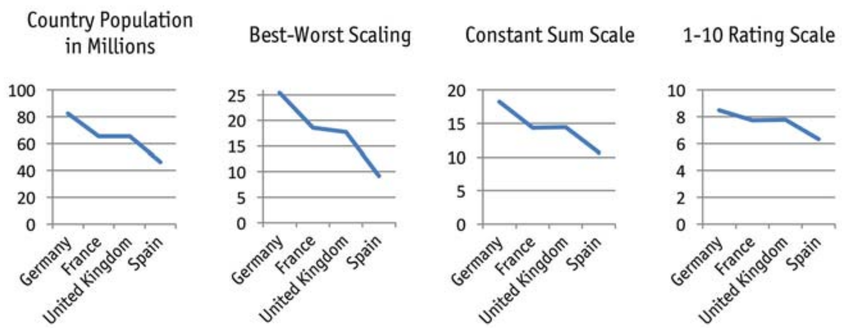
But can we demonstrate that BWS captures relative metric information with real respondents? We recently conducted a BWS study using 350 respondents from Amazon's Mechanical Turk panel sample. The challenge was to select items with a known quantity metric so that there was an absolute truth to validate against, so we decided to use the population of nine European countries. As a training task, we first showed respondents the nine countries with their populations (in alphabetical order). Following the training task, we asked respondents a few tangential questions regarding which of the nine countries they had visited before and which countries would be best to visit in summer or winter.

Next came the main focus of the study. We asked respondents to rate the nine countries based on relative population size using a 10-point rating scale (endpoints labeled 1 = "less population," 10 = "more population"), a 100-point constant sum scale, and using BWS (seven sets of four items each). Respondents completed all three exercises and we randomized the order to control for order bias. In the BWS exercise (labeled "most population," "least population"), respondents saw each country at least three times. We averaged the scores across

Table 2

European Country	True Population Size (Millions)	Best-Worst Scaling Results N=350	Constant Sum Results N=350	1-10 Point Rating Scale Results N=350
Germany	82.29	25.43	18.22	8.47
France	65.23	18.60	14.30	7.72
United Kingdom	65.11	17.73	14.47	7.77
Italy	59.32	11.98	11.28	6.70
Spain	46.40	9.18	10.65	6.32
Ukraine	44.01	5.72	8.75	5.25
Poland	38.10	5.53	8.36	5.18
Romania	19.62	3.07	6.96	4.43
The Netherlands	17.08	2.75	7.00	4.18
Sum:	437.16	100.00	100.00	56.02

Figure 2



respondents for the three scaling approaches (Table 2).

The rank-order recovery for the nine countries' populations was perfect for BWS and nearly perfect for 1-10 and constant-sum scales. The next thing we noticed is that, true to previous research, BWS led to larger ratio differences among the scores compared to constant-sum and especially 10-point rating scales. The degree of response error affects how much more accentuated the BWS scores become but in every case we've compared to the 1-10 rating scale, BWS shows greater differentiation. (We used an exponential transform of the logit estimated utilities to place the BWS results on a ratio scale with a meaningful zero point.)

The largest four countries offered the opportunity to see whether BWS could capture relative metric differences beyond just rank-order information (Figure 2).

Remember, we reminded respondents regarding the true country populations at the beginning of the questionnaire. France (65.23 million) and the U.K. (65.11 million) have nearly the same population. Germany is larger with 82 million and Spain smaller with 46 million people. How well did the three methods recover the fact that France and the U.K. essentially have the same population?

Referring to Figure 2, BWS appears to be capturing something more than just rank order: it recovers the fact that France and the U.K.'s populations are much closer relative to Germany and Spain, along with directionally showing that France has slightly larger population than the U.K.

Looking just at average scores across a sample can cover up a lot of ugliness happening at the individual level. Those individual-level problems can be especially detrimental when classifying, clustering or segmenting respondents and making predictions. As a straightforward individual-level consistency test, we examined whether the average of the scores for the true top three countries, middle three and bottom three were in descending order. If the three summary estimates were in the correct order for a respondent we scored a hit for the respondent, otherwise we scored a miss. BWS (via HB estimation) showed 80 percent individual-level consistency, the 10-point rating scale had 65 percent and the constant-sum scaling showed 62 percent consistency. HB's ability to "borrow" data across the sample probably is cheating for this individual-level validation, so we reestimated the BWS utilities without any data-borrowing via purely individual-level logit estimation and found that the BWS consistency score was still superior at 72 percent ($p<0.01$).

This advantage in terms of individual-level consistency (Figure 3) helps explain BWS's superiority for classification, clustering and prediction relative to the rating scale methods.

We recognize that our experiment focused on the ability of respondents to recall factual information rather than their ability to express preference or importance. There are psychological differences, for certain. Given that we have already conducted and seen multiple comparative studies among these methods on preference/importance scales, we thought it would add to the discussion to conduct this research involving memory recall of objects with known and true metric measures.

Some known preference

Best-worst scaling involves just comparative judgments. We don't learn whether respondents like or dislike the items in any absolute sense. One solution is to include an item in your study that has some known preference, monetary value or importance. You can then compare the score for the known item to the other items in the experiment. Another solution is anchored BWS: adding a few questions to a BWS study to establish a meaningful anchor point, such as buy/no buy, like/dislike or important/not important.

We applied anchored BWS to the evaluation of European country sizes. After we asked the BWS questions, we computed the scores for each

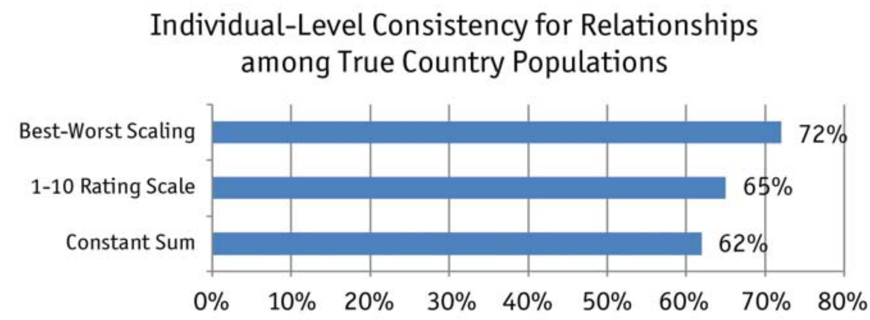


Figure 3

individual on the fly. We ranked the countries from first to ninth based on each respondent's scores and asked respondents whether certain countries had more or less than 50 million people. Rather than ask for all nine countries, we shortened the task by asking about only the first-, third-, sixth- and ninth-place countries in terms of the respondent's individualized ordering.

After reestimating the model with the addition of the anchoring information, the new BWS scores now were scaled relative to an anchoring point of 50 million in population, with the anchor located correctly between Italy (59 million) and Spain (46 million people).

An exceptional tool

With or without the optional anchoring step, best-worst scaling yields more than just rankings. Using both robotic and real respondents, we've shown that it recovers relative metric differences among items. If obtaining discriminating measurement of preference and importance is critical to you, if you want to avoid scale use bias and if you want to improve your market segmentation and predictions, then BWS is for you. It is a truly an exceptional tool in the researcher's toolbox.

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••• financial services research

Standing out from the pile

Study explores the elements of winning credit card offers

| By Mike Berinato

snapshot

The author draws from a survey of financial decision-makers to examine the features that make a credit card attractive.

www.quirks.com/articles/2018/20180706.aspx

Consider your wallet. There are probably a few credit cards in there – about three or four, if you're like the average American.[1] Why did you choose those particular cards? Was there a benefit or feature that swayed your decision? Are you interested in getting more benefits from your credit cards? Do you even know all the features your cards have?

For card issuers, understanding the answers to these questions is a key step to getting their card into more wallets. The competition among card issuers is tougher than ever. Issuers face pressure to constantly add new customers, either by convincing them to add a new card to their wallet or to replace a card. But a credit card is essentially a commodity and card issuers have to continually differentiate their offerings.

It's no surprise then that credit card advertising often focuses on card features – miles, cash back, club access, concierge service, gift products. The payments team at Market Strategies identified 18 commonly offered features. While consumers can find a card that focuses on the availability of one of these features, most cards actually include many of them.

We started thinking about this market from our own perspective as credit card users – how focused are we on the benefits in our wallets? When issuers add more benefits to a card, does that strategy actually win customers? Or could it be that the credit card market is suffering from "feature creep" – a state where issuers one-up each other by offering cards with more and more benefits, regardless of their actual value to cardholders? If adding more features doesn't work, how can companies most effectively use benefits, perks and rewards to attract customers?

To investigate these issues, we included a series of questions specifically about credit card decisions in our twice-yearly omnibus study. These studies are broad surveys that ask participants about their financial habits and decisions, among other things. We surveyed more than 1,000 people who qualified themselves as financial decision-makers.

We examined consumers' overall interest in the different benefits

and rewards in their primary credit card. We also asked these decision makers how features ranked in importance – which features are nice-to-have, which are must-have and which tip the scales when choosing between two cards.

Assume consumers want them

The fact that so many features are available suggests that issuers assume consumers want them – after all, issuers take on considerable expense when adding more benefits to a product offering. But perhaps that assumption is just what marketers think consumers want.

In fact, our survey results suggest that cardholders don't know as much as you might expect about their existing card benefits. We found that over 80 percent of consumers are not fully aware of all the benefits their card offers. It seems likely that many of the features attached to cards are going unused or, even worse, are unknown to cardholders.

Does that make rewards unimportant or even unattractive? Certainly not. Our research shows that consumers do care about the benefits offered by their credit cards. Indeed, we found clear patterns in the ways and levels to which consumers value card benefits. Some benefits are important to nearly all cardholders. And, beyond those must-haves, there's a pattern by user age. What each cardholder wants is a package of rewards that is relevant to his or her lifestyle.

Value is the dominant feature that cardholders want. In our survey results, value-related features rated the highest. A card's annual fee, interest rate, cash-back level and a zero-APR promotional period are the most important benefits for card consideration and adoption (Figure 1).

Functionality also ranks as a must-have. Identity-theft monitoring and 24/7 customer service are highly desired by cardholders. In the modern era of electronic transactions and round-the-clock access, cardholders have come to expect that their credit card will be a cop on the beat, so to speak – that it will protect and serve.

Figure 1

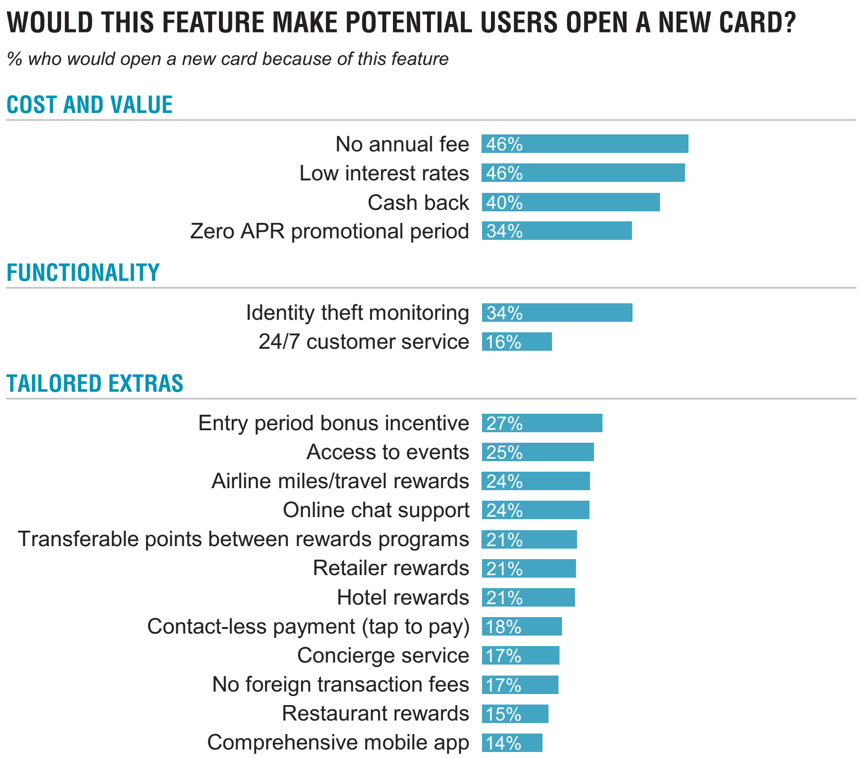
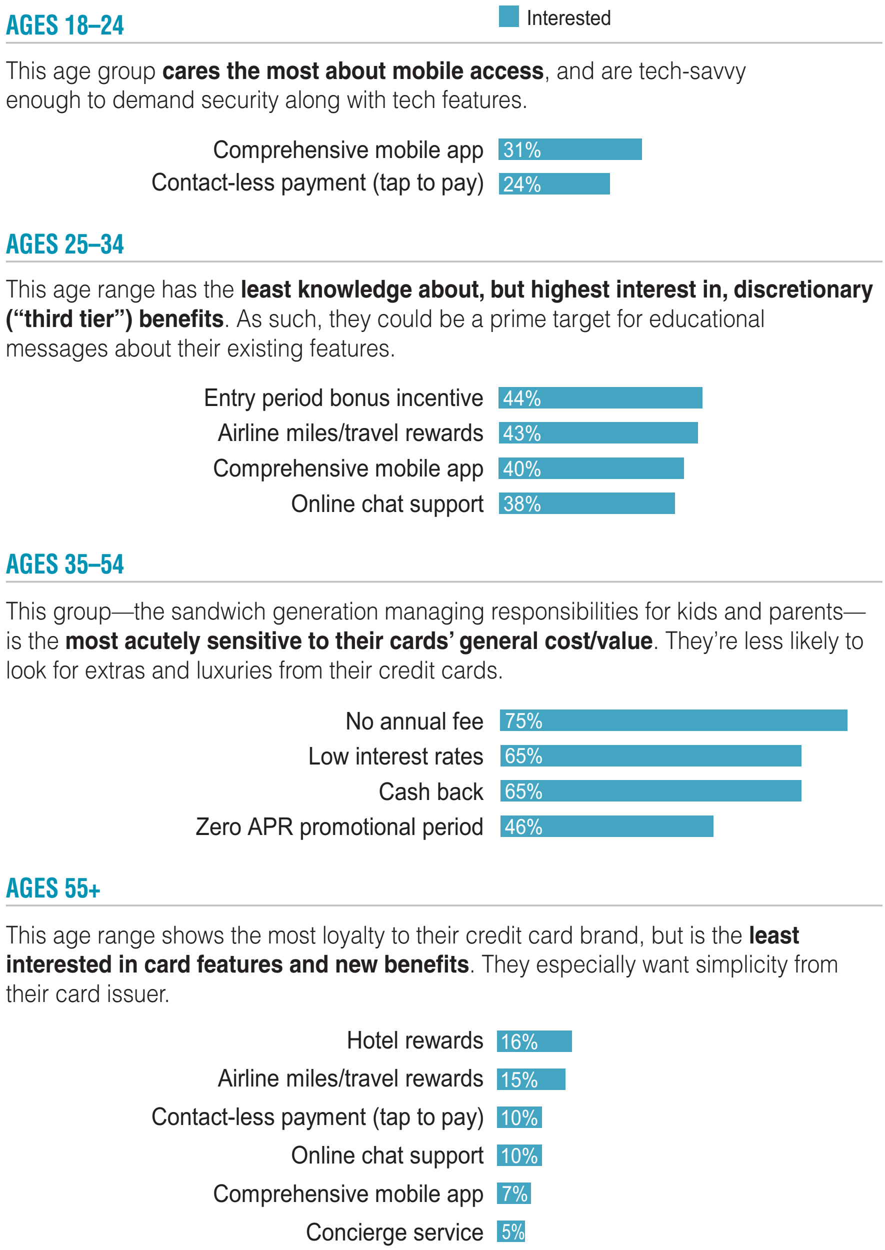


Figure 2

UNIQUE ATTITUDES BY AGE GROUP



It's only after these critical features are established – good value, protection and support – that rewards-oriented features play a role. These are the more glamorous benefits: access to events, travel and retailer rewards, for instance. Tellingly, a higher percentage of respondents marked these features as nice-to-have – something they would value but would not rank as their top priority. However, we found that these tailored extras can be a tipping point for consumers in choosing one card over another. The impact of any one reward is diffuse, though, as different consumers have different needs.

Masterful at matching

If the impact of any one reward is low, it's all the more important that card issuers are masterful at matching the right reward with the right consumer. As with any financial decision, we found that consumer preferences are broadly defined by what stage of life each survey participant is in (Figure 2). Using age as a proxy for life stage within our omnibus data, we found interesting and consistent differences in reward rankings.

Tech for the youngest. Unsurprisingly, the youngest cohort, respondents ages 18-25, are the most focused on technology offerings. They showed the strongest preference for mobile access and tap-to-pay availability and are tech-savvy enough to demand security along with tech features.

Up-and-comers want lifestyle perks. Of the two age groups in the middle, the younger end (ages 25-34) is more likely to be interested in lifestyle benefits like airline miles and travel rewards. They typically have the time and opportunity to take advantage of these benefits and would choose a card with an introductory bonus offer that sent them on their way. However, they also demonstrated the least knowledge about the benefits they already have. Cardholders in this demographic could be a prime target for educational messages about their existing features.

The sandwich generation seeks value. Finally, cardholders ages 35-54 show a strong preference for value above all else. They're the most likely age group to be managing responsibilities and expenses for children and maybe even aging parents. This cohort is less likely to look for extras and luxuries from their credit cards and more likely to seek retailer rewards that compensate them for what they're already doing.

Simplicity for the most mature. The 55+ crowd is the most loyal to their current card. They have figured out what they need and so other benefits are less likely to push them to a new card. Better travel rewards would impact some, as they are likely to have the financial means to enjoy them. And "making it easier" with tap-to-pay and online chat support is attractive for some.

Package of benefits

For a credit card offer to cut through the clutter and appeal to a consumer, it must offer a package of benefits targeted to that consumer's personal needs.

For issuers, this means identifying the different needs of potential cardholders and crafting the offer that can best meet those needs. Our preliminary research uncovered some important foundational insights for that process. First, the typical cardholder is not aware of all of his or her card's benefits and therefore, adding more features to the package is unlikely to inspire adoption. Second, all consumers care most about a card's value and functionality. Rewards and extras are unlikely to sway any decision-maker unless they are thoughtfully paired with benefits that cover those value and functionality bases. And third, different age groups show distinctive preferences for what they want in a credit card. A deeper look at life stage, demographics, psychographics and purchase behavior would enable a more precise targeting strategy.

Perhaps the time has come for an a la carte approach that allows consumers to customize their own card. An offer that allows consumers to choose their preferred cost benefit (e.g., no annual fee or a lower interest rate) and the rewards they most need would be extremely compelling. Additionally, an offer that provides the option of trading cost for reward features – such as accepting a yearly fee to get airline miles, hotel points or an entry-period bonus – would be even more appealing to the right customer. With a customized card, cardholders would be aware of all its features, feel a stronger connection to its benefits and likely increase use of the card.

Barriers and friction points

These kinds of insights are just the beginning of the acquisition process. Identifying the needs of your target consumers and customizing your offering will not, unfortunately, guarantee acquisition. Issuers also need to determine where to place the offer and how to engage with consumers. Furthermore, issuers need to understand the barriers and friction points that are pushing their offer out of consideration.

This means mapping the path that consumers take to their card choice and knowing where and why the decision is being made. It's not enough to customize the benefits being offered to consumers; you also need to customize the channel, the messaging and the reasons to believe so that you are meeting each consumer at the right spot in their path with your offer. Ultimately, a properly articulated path will speed the decision process and help issuers to achieve more with their efforts.

The right starting point

As marketing strategies get more complex, it's important to remember that all of the decisions marketers make along the way rely on assumptions about a market; the right starting point is needed. In the case of credit card holders, our research into benefits preferences yielded some important foundational insights, like the idea that cardholders may not share the same view of card benefits as marketers. According to our data, the typical cardholder is not looking for more features from his or her credit card. To us, this suggests that "feature creep" could be a prime example of how it's important to consider your assumptions about your consumers.

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snapshot

Michael Shuker and Courtney Stopansky explore their department's research-on-research on the impact of a move from five-point to seven-point scales.

••• financial services research

In search of consistent returns

How PNC Bank tested changes to its CX evaluation scales

| By Michael Shuker and Courtney Stopansky

Based in Pittsburgh, PNC Bank, one of the largest regional banks in the United States, maintains a customer focus as one of its core values. In order to deliver on this value, PNC has a strong commitment to customer satisfaction. A critical component of this commitment is the use of follow-up surveys to assess customer experiences across a range of PNC Bank products, services and interactions. This voice-of-the-customer tracking has become fully ingrained across PNC Bank's various business units. The surveys are administered by the insights and market dynamics (IMD) group within PNC Bank's retail marketing division. Results are reported via continuously-updating dashboards or on an occasional basis and play a key role in PNC Bank's ongoing improvement efforts.

For several years now, as a part of this customer service experience evaluation, regular surveys have been administered to customers who have interacted with a PNC Bank branch banker or representatives at PNC Bank's customer care center to assess satisfaction with the respective experience. When customers have an interaction with a PNC Bank employee in a branch or in the PNC Bank customer care center, they are eligible to receive a follow-up e-mail invitation to participate in a brief survey to assess their overall satisfaction.

The surveys are typically brief, three-to-four-minute questionnaires covering the overall experience and a number of scaled attributes to identify drivers of customer satisfaction of working with branch or call-center employees. The scaled attributes explore customer reactions to the experience and perceptions of how well their interaction was handled by the PNC Bank employee. In addition, there is a customer advocacy measure with a follow-up, open-ended question to understand the impact of the branch or care-center experience on the customer's likelihood to recommend PNC Bank.

Most surveys administered across PNC Bank and, in particular, these follow-up customer experience surveys, utilize seven-point scales to assess performance across a range of attributes. This branch and care-center survey predated efforts at standardizing survey design within PNC Bank; therefore, it instead incorporated five-point scales for attributes. Thus, the scaled evaluations used in the branch and care-center transactional survey are being transitioned from the current five-point scales to seven-point scales, allowing these crucial surveys to be in alignment with others conducted across different lines of business within PNC Bank and allowing for better understanding of how these branch and care-center experiences fit within the broader PNC Bank business.

Some concern

However, since the results of these surveys can have direct and indirect impacts on branch and call-center employees' internal evaluations, there was some (highly justified) concern from stakeholders within the line of business about the transition. In particular, these stakeholders expressed apprehensions as to whether the past-state and future-state scales would prove to be comparable and if there would be any impact on the customer recommendation scores associated with employees. It was up to the IMD team to provide evidence that switching scales would not cause any significant disruption in what the results of these surveys ultimately mean for the employees being evaluated.

To test any potential impact of switching scales, IMD chose to conduct a split-sample experiment using our internal Customer Insights Community Panel, administered by our external research partner, Morpace Inc. This research panel is a group of approximately 12,000 current PNC Bank customers who have agreed to participate in various research activities with PNC Bank on an occasional basis. IMD works with this panel to conduct all types of qualitative and quantitative research, such as assessing marketing communications, getting feedback on Web site user experience, small business banking customer needs and testing new names for products or services. It is a valuable resource that has impact across the entire business. The panel gives our customers an avenue to provide valuable feedback and ensures that PNC Bank's products, services and messaging are aligned with genuine customer needs and expectations.

Developed two versions

To understand the potential impact of changing the branch and care-center survey attributes from five- to seven-point scales, IMD developed two versions of the customer experience surveys to be administered within this customer panel. The original version, using the five-point scales for overall satisfaction and attribute evaluations, was fielded along with a revised version using seven-point scales instead. Invitations went out to all members of the panel, which resulted in over 2,600 completed surveys.

The bipolar agreement scales, as used in the survey, are presented here. Note that neither included a mid-point label.

Strongly Disagree 1	2	3	4	5	6	Strongly Agree 7	Not Applicable

Strongly Disagree 1	2	3	4	Strongly Agree 5	Not Applicable

Panelists were directed to either the branch version of the survey or the care-center version of the survey, depending on their most recent, self-reported experience. Half of the branch or care-center survey respondents went through the survey with five-point scale attributes, while the other half went through a version with seven-point scale attributes; similarly, half of the care-center respondents received the five-point version and the other half received the seven-point version. Final sample sizes for each cell are provided in Table 1.

Of particular interest in the results was the alignment between top-box and top-two box scores from the sample using the five-point scale and the corresponding top-box and top-two box scores from the sample receiving the seven-point scale version.

Our hypothesis was that results would show that the top-box scores from the five-point scales would be spread out over the top-two boxes on the seven-point scale. IMD expected that some sort of heuristic could then be developed from the results to understand the relationship between the two scales to allow converting from one scale to the other, so as to eliminate or minimize any disruption in employee evaluations. Alas, the results were not as we expected.

Table 1			
	5-Point Scale	7-Point Scale	Total
Branch Survey	686	674	1,360
Care Center Survey	661	646	1,307
Total	1,347	1,320	2,667

Figure 1

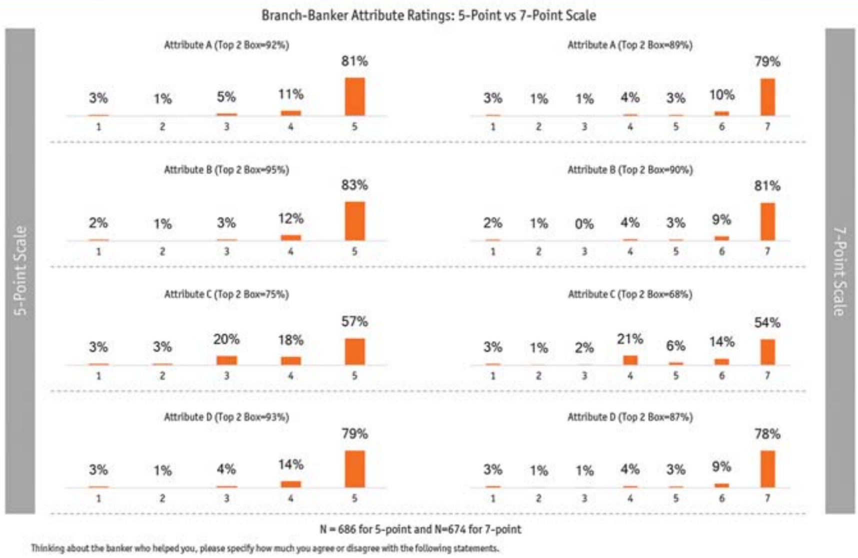
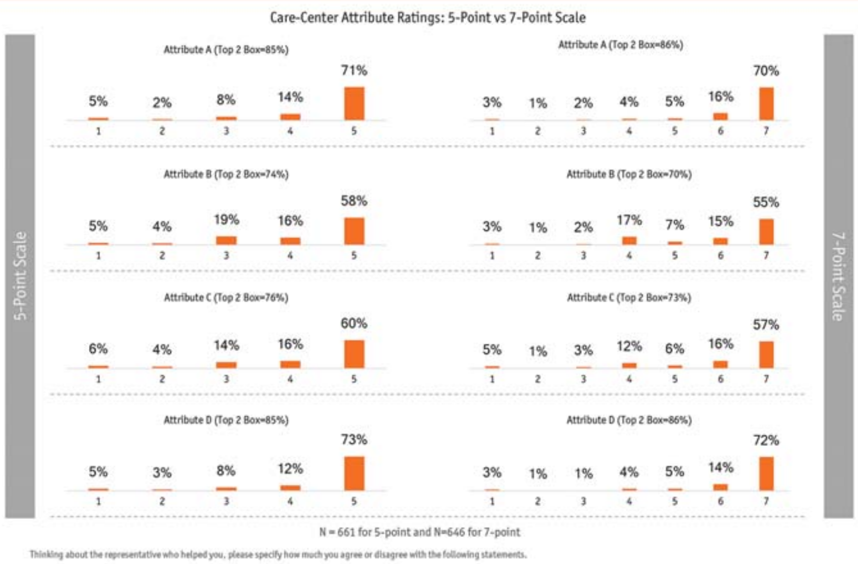


Figure 2



Quite a surprise

The results were analyzed using SPSS and proved to be quite a surprise in that there was near-perfect alignment between top-box scores for the five-point scaled attributes and the top-box scores from the seven-point scaled attributes (Figure 1).

The charts in Figure 1 provide results across four of the attributes used in the branch survey. In no case is there more than a three percentage-point difference between five-point scale results and seven-point scale results on a top-box basis. There is even a high degree of correspondence between middle-box scores as well. In fact, the primary differences appear to be that ratings of 4 on the five-point scale tend to get split up between 5 and 6 on the seven-point scales.

These results are further supported by the results of the care-center surveys, where a similar set of attributes demonstrated a similarly high degree of alignment between the two versions, as seen in Figure 2.

These findings did not match the IMD team's initial hypothesis that the seven-point scale would show lower top-box scores and would reflect respondents splitting their highest ratings between scores of 6 and 7. Importantly, it demonstrated to our internal business partners that there could be a seamless transition from the five-point scale to the seven-point scale with minimal impact on employee evaluations. However, there was still a question about any impact of switching scales on employees' customer recommendation scores, a critical measure for employee evaluations.

To test the effect of scale on customer recommendation scores, IMD ran crosstabs in SPSS to determine if there were any differences in the percent of respondents who would be classified in the top-two box (a 9 or 10 on the customer recommendation scale) among those providing top-box scores on each of the two scales. In essence, IMD was seeking to answer the question of whether responding to a five-point scale survey would result in any discernible differences in customer recommendation from responding to a survey with a seven-point scale. The expectation was that there should be no significant difference but IMD wanted to be able to make a solid case to their internal business partners, since customer recommendation scores are very important to their efforts.

The results of this additional test demonstrated that respondents recommend in the top two box at the same rate, regardless of whether they were part of a five-point scale survey or a seven-point scale survey (Figure 3, Figure 4).

This finding added additional support for the fact that the transition from the old surveys to the new would have minimal impact on employee evaluations. It was an additional layer of support for the transition.

Tracked over time

While the results of this test were quite conclusive, one area for further research and discussion concerns the fact that the scores on these evaluations tend to be fairly high (top-box scores in the range of 60 percent to 80 percent are common). There is still a question about whether this degree of alignment between top-box scores would hold up

Figure 3

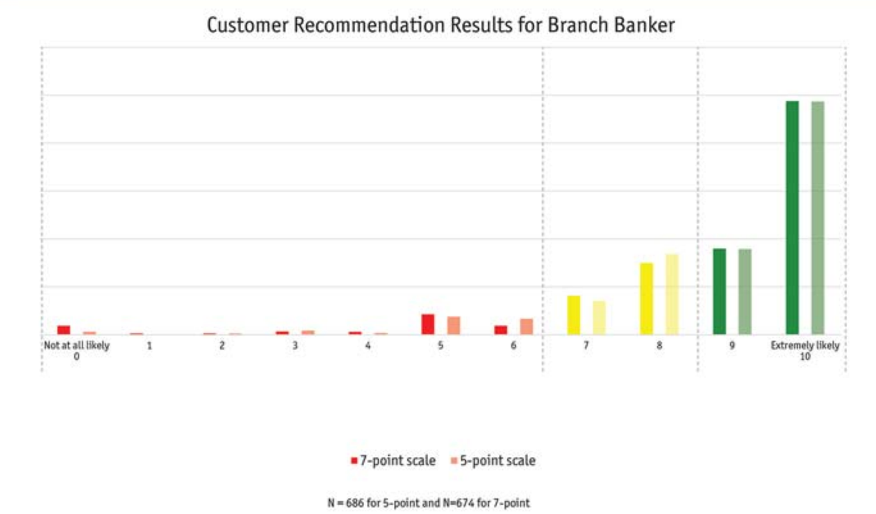
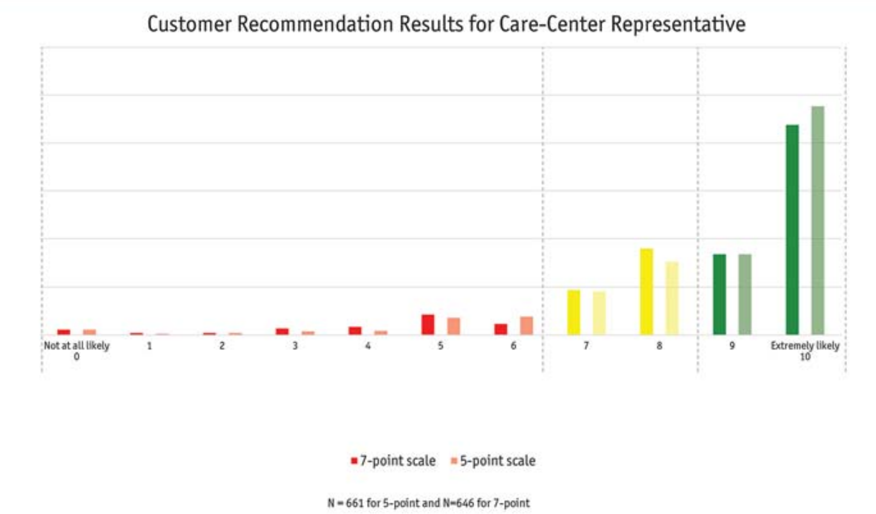


Figure 4



with more critical evaluations (i.e., more negative customer experiences). It is something that will be tracked over time as these surveys continue to be administered in the future.

The results of this experiment have been presented to our internal business partners with the recommendation that they convert from their current five-point scale survey to a seven-point scale variant to get these critical employee evaluation tools in line with the rest of the business. IMD was able to make the strong case that there would be little or no disruption in employee evaluations. Importantly, making this shift will allow for the results from the branch and care-center evaluations to be compared to results from other business units. This will provide for understanding evaluations not just among employees within a specific department of function but also across the various departments and functions. This will allow PNC Bank to continue to assess its internal processes to ensure that it provides the service to customers that ensures their greatest satisfaction.

This test also further highlights the utility and importance of our customer research panel. Having a large group of customers essentially on standby to run this test with was vital in our ability to help business partners make agile decisions. Additionally, it allowed us to continue to demonstrate that PNC cares about our customers' financial well-being by ensuring that PNC is measuring their experiences as consistently as possible.

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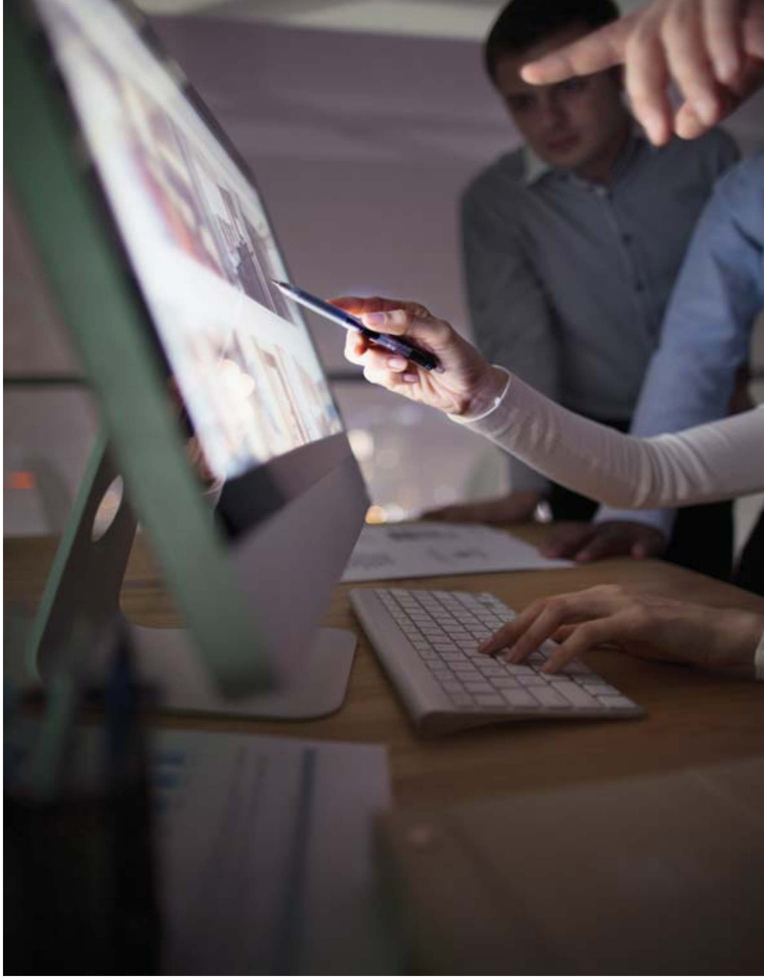
••• shopper insights

Decoding the product page

Which elements matter most on a Web shopping page?

| By Mirna Djuric, Olivier Tilleuil and Mina Miljkovic



snapshot

Eye-tracking research on Web sites helped determine why Walmart product pages drove better sales than the competition.

With online shopping booming, significant growth opportunities are opening up for retailers and brands. To take advantage of this potential, companies need to invest in a clean and streamlined user experience. But, as our research has found, some Web page elements are more important than others. For example, product pages are one of the key factors that can make or break your online sales.

To uncover the basic elements that drive conversion on these pages, our team conducted an eye-tracking study analyzing the product pages of leading retailers Walmart, Amazon and Target. The research showed that shoppers are more likely to buy the product from Walmart than from the other two retailers after browsing their product pages. Our goal was to discover the elements that correlate with purchase intent and offer recommendations for both retailers and their client companies.

We conducted our study in partnership with the panel company Lightspeed. The recruited 300 online shoppers were asked to browse two product pages of their preferred online grocery shop while the EyeSee team tracked their eye gaze. We chose popular brands within two large categories: Colgate (toothpaste) and Tide (laundry detergent). Afterwards, the online shoppers were asked to choose products they would prefer to buy.

You may think of a product page as an equivalent of picking up a product with one's hands and mulling over the purchase. Many questions emerge in this thought process but most of these activities take place in the subconscious part of the mind of which we are seldom aware. By changing the features of the product page, we can influence both conscious and subconscious aspects of the decision-making process.

More than half of the shoppers (53 percent) who land on the Walmart product page also end up purchasing the product, while only 47 percent of Amazon- and 46 percent of Target-based shoppers make the purchase after browsing the product page (Figure 1). What drives this advantage?

Although all three pages have essential elements that help to drive successful online sales,

www.quirks.com/articles/2018/20180708.aspx


Toluna
Can't predict the future?

Figure 1

After seeing the product page, would you be interested in purchasing the product?

		Walmart	amazon	TARGET
Product page	Tide	48%	44%	50%
Product page	Colgate	57%	50%	41%
	Average	**53%**	**47%**	**46%**

Walmart's product page has slight advantages: a larger product image; a visible and user-friendly "add to cart" section; visible and user-friendly size and quantity options.

Eye-tracking enabled us to measure the amount of time online shoppers spent gazing the different elements of the product pages (Figure 2). At Walmart, they paid much more attention to the product image: 23 percent of total time spent per page, with much lower rates on Amazon and Target pages (14 percent and 17 percent, respectively).

Given its larger size, design and proximity to the product image, the "add to cart" section yielded a greater number of views as well. On top of that, Walmart's "add to cart" is considered to be much more relevant and useful for the purchase decision than the same section on other Web sites (30 percent better than Amazon and four times better than Target).

Does not translate

While the time people spend looking at the product image is positively related to purchase intent, this is not the case with the time spent on the page as a whole. Amazon holds shoppers on the page 50 percent longer compared to Walmart and Target but this alone does not translate into purchase intent.

Exploring the product image for a longer period of time shows positive emotional engagement – in this case, consumers presumably like what they see and are interested in learning more. However, spending too much time on the product page might also indicate confusion. It is possible that the consumers could not find what they were looking for or that the page was not entirely user-friendly. Shoppers might find this frustrating and give up on further browsing of that particular site.

Product picture is the most attention-grabbing element of the product page (Figure 3). It is the first-to-be-seen and the-longest-looked-at element, taking in around 20 percent of the total time dedicated to the product page. This section is one of two areas considered the most useful and relevant for the purchase decision.

A shopper can obtain a lot of information about the product just by looking at the image; he/she does not need to read the description to make a purchase decision. Also, since people base their purchase decisions on the package design while shopping in the store, it makes sense that they're influenced by the product image in an online environment. Plus, images attract more attention in general and communicate more efficiently than words.

Most important areas

Optimization of the product page should be focused on the most important areas of the page. According to our data, these are (1) the product image and (2) the "add to cart" section, followed by product name and suggested products. People devote most of their attention to these areas and consider them useful and relevant for their purchase decision.

Size matters. To make the most of the online "moment of truth," product image should be optimally-sized, at a high resolution and well-positioned. Multiple-angle product images are an added bonus. On average, respondents spend more time looking at larger product images, as they attract more attention, which is positively correlated with the purchase intent. On the tested pages, the product image area with Walmart is twice as big as the same area with Amazon and 1.5 times bigger than with Target.

Another example of a best practice demonstrated by Amazon is boosting the product image area with hero shots (visually presented product benefits). This detail has turned out to be very useful and relevant for the purchase decision.

Tweaking the "add to cart" section. It's vital for this section to be clear and user-friendly. Walmart's design takes the prize, being large, with sizeable buttons and print, and positioned close to the

Figure 2: The amount of time spent browsing Walmart's product images is up to 70 percent longer compared to Target and Amazon

In the eye-tracking heat maps, red signifies higher attention, green lower attention.

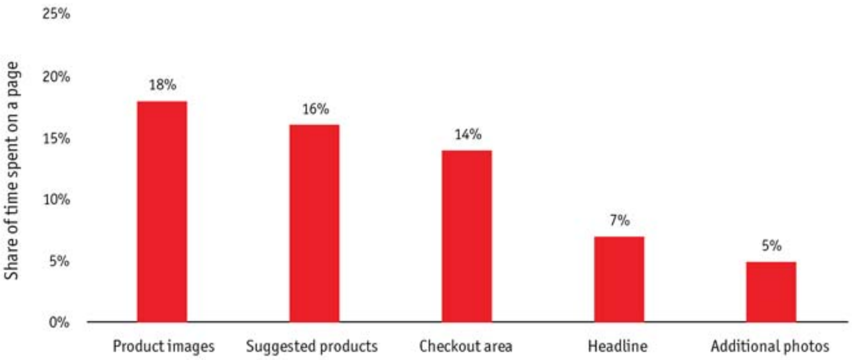


Figure 3: The (product) image is worth a thousand words

product image. The information offered is clear, with important details highlighted (price, discount, shipping, etc.) and excessive ones omitted. This design attracted the most attention compared to other sites, as all these factors contribute to better visibility. On average, 92 percent of respondents noticed this section on the Walmart page, 86 percent on the Amazon page and 34 percent on the Target product page.

Amazon's "add to cart" is overloaded with small print and is potentially missing the most relevant information – therefore, visitors don't consider this section useful and relevant for their purchase decision (on average four times less frequently than on other sites). Target, on the other hand, also has a poor "add to cart" section but consumers still evaluated it much better than Amazon's crowded checkout area.

Complementary vs. alternative products. While Target and Walmart offer alternative products (i.e., variants of the SKUs within the category), Amazon uses the "complementary products" strategy that shows other categories of products that are frequently bought together. Both strategies are legitimate but they support different goals: While the "alternative products" strategy helps shoppers decide on the exact product they want, with the aim of reducing dropoffs or selling more expensive products (upselling), the "complete-the-basket" strategy can drive direct sales (cross-selling).

When it comes to boosting e-commerce revenue, it is expected for complementary products (cross-selling) to be the most effective at the checkout page. Our study shows some advantages of the cross-sell strategy at the product page as well. The complementary products section holds 30 percent more attention than the alternative products section, which could also signify higher purchase consideration. As expected, visitors spend more time looking at new items rather than contemplating on, or second-guessing whether, their purchase was the right one.

What to offer. When choosing between these two strategies, companies should primarily consider customer experience; that is, offer what is appropriate in each stage of the decision-making process. Dependent on the category, these strategies can be equally useful and relevant for the purchase decision. Alternative products were perceived as more useful once they provided an opportunity for price comparison between single and multi-packs (toothpaste) while in the detergent category complementary products performed better. This section should be positioned closely below the product image (above the fold) rather than below the description and other information. This way it has sufficient visibility to potentially affect purchase decisions.

Focus on key elements

When optimizing the design of product pages, retailers should focus on key elements (i.e., product image, the "add to cart" section, etc.) and their size and positioning. These are directly correlated to consumers' attention spans and the time they spend on the page, which can either positively or negatively impact the level of sales. Leading shoppers through the browsing and shopping processes and providing a seamless user experience is vital for achieving consumer satisfaction and increasing conversion rates.

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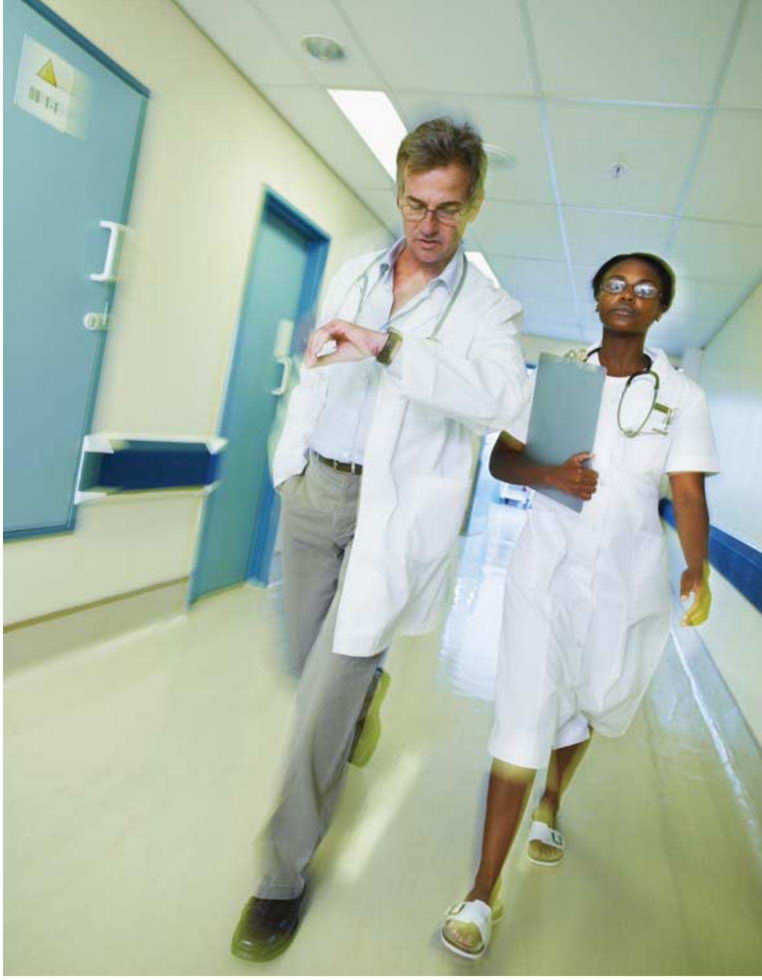
••• qualitative research

There's value in valuing their time



Using tech to improve life sciences qual

| By Charu Gupta

snapshot

The author looks at ways that technology can help make qualitative research more appealing to physicians.

How we conceive and conduct qualitative research is in need of a refresh. Market researchers continue to worry about diminishing sample size and quality. This is starker for the life sciences industry, where physicians and health care stakeholders are busy, well-paid professionals who easily ignore or opt out of lengthy or difficult questionnaires.

By most accounts there are about 900,000 prescribing physicians in the United States. The largest health care panels have about 675,000. Response rates are in the 2 to 5 percent range. So, for any type of market research project, physician access is really between 13,000 and 33,000. That's before any screening for specialty, product use, patient count, eye color, etc.

When it comes to qualitative research participation, there is even more reason to worry. Last year, InCrowd asked more than 100 physicians through our market intelligence platform if they had participated in qualitative research in the last 12 months. Forty-two physicians, about 40 percent, said no. And 36 percent of these physicians said it was because they did not have the time.

For the 63 physicians who did participate in the last 12 months, their top two issues were scheduling (it took three contact attempts on average to get a qual interview scheduled) and the length of interviews (an average of 60 minutes). It is safe to say that if the industry does not make significant advancements in how qual research is conducted (and if drug and device manufacturing companies do not adopt these improvements), then the number of physicians opting out of qual research will only climb.

The good news is that there is meaningful innovation happening in the qual research space. The trick is to find out what is substantive and helpful to methodology and data quality, versus what is just shiny and new.

www.quirks.com/articles/2018/20180709.aspx

Ripe for automation

Anyone who's gone through a qual project knows how tedious it can be. There's a lot of repetitive steps. What the industry is catching onto, however, is that this very tediousness is also a strength when you throw technology into the mix. The very systematic approach to gathering and interpreting primary market research is exactly what makes it ripe for automation and innovation.

"It is critical that technology is not just about speeding up the process but, rather, getting the job done both faster and well, with service and compliance built into the technology."

The life sciences industry is slightly different than consumer goods in that it moves more slowly. Government regulations and compliance requirements around conflicts of interest and blinded research necessitate a more cautious approach. Nowhere else will you find the same level of regulation and compliance before bringing products to market. In this climate, life sciences market researchers can do themselves a favor by finding compliance-tested technologies and vendors who are building new tools with this restrictive environment in mind.

It is critical that technology is not just about speeding up the process but, rather, getting the job done both faster and well, with service and compliance built into the technology. This is often where technology businesses get it wrong when they try to enter the health care and life sciences space and why pharma companies (rightfully so) get the jitters in using new technologies.

Shorter interview duration

Let's get back to our physician findings on the qual experience. One of the top two improvements to their experience was shorter interview duration. Of the 63 physicians who had done qual in last 12 months, 85 percent said they would be very likely to participate if interviews were 15-20 minutes or shorter. Out of the 42 who had not participated at all, 71 percent of them said they would be willing to do the interview if it was, you guessed it, between 15-20 minutes.

Clearly, 15-20 minutes for a qual interview would be the sweet spot for physicians. But is it possible? In some systems now, it can take up to 20 minutes just to screen and qualify physicians to enter the interview. That's a huge miss – but one that technology can address. Think about it from a physician's point-of-view: 20 minutes spent on asking screening questions and accepting terms of use before the actual substance of the interview – the reason they responded in the first place – even begins. What's the likelihood of that physician coming back to such an experience over and over again?

Another top complaint by physicians was the difficulty of getting the interview scheduled in the first place. This is another area ripe for technology. The basic idea is that respondents should be able to select from multiple available interview times and that this information capture should update in real time for everyone involved, from project managers to moderators to clients to physicians. Rescheduling should be just as easy: automated reminders with the ability for respondents to reschedule within the reminder or app itself without having to pick up the phone and manually call the agency or exchange multiple e-mails.

Technology that works this way does exist today. By automating the scheduling process, teams don't have to hold open massive blocks of time over multiple weeks. Think about it in terms of reducing your qual research timeline from weeks and months to days.

What you cannot lose track of are your compliance needs. Any new technology must be able to handle automated scheduling and enable double-blinded research. For life science companies, subject to rigorous FDA regulation, no compromises can be made here. Look for a level of sophistication that allows moderators to dial out to participants and bring them into a call without actually knowing their phone number. That's the kicker: increased privacy without the hassle of moderator or participant searching through old e-mails for contact information.

Data and document sharing

Another advantage of technology-enabled qualitative research is centralized data and document sharing. Such central project management dashboards are built into new qual technology platforms, with updates in real time and with user control preferences and push notifications sent to everyone involved. This gets rid of that heinous Excel spreadsheet and the struggle for version control. Online dashboards should not be an add-on or a nice-to-have feature that unlocks at a higher tier. Rather, tech companies that are really thinking about the myriad and complicated processes involved should be providing this functionality at the ground level.

The upside to these kinds of centralized communications and project management dashboards is that you are in control. Interviews, transcripts, recordings, scheduling, discussion guides, etc., all go into one place for you to easily follow and share. But the bottom line is that these platforms remove the need for you to spend your time finding the right participants, scheduling, setting up teleconferencing, managing participants and moderators, recording, transcribing, delivering honoraria or waiting for vendors to coordinate their part of the process. You can spend your time understanding the project needs and analyzing the deliverables. So if these tools exist and they are so awesome, why aren't they gaining traction?

Wish they could

In a survey by InCrowd in 2017, of about 100 life sciences market researchers, 21 percent told us they are already investing in some of the technology described above. However, another 78 percent told us they aren't investing but wish they could – due to a variety of factors like budget, status quo, a cautious corporate culture and aversion to risk.

Clearly, the industry is still heavily invested in traditional techniques. The key pain points are broader buy-in across the organization and making sure quality of engagement and representation in sample stay intact.

If you're not currently using automated qualitative research, look for vendors or technology platforms that are centralizing the management of the qualitative research process. The technology is there to give you control and streamlined interview setup, deployment and deliverables.

For those already using a tech platform currently on the market, check to see if the solution is in fact a series of vendors and platforms sewn together. Though this approach might work in other industries and for other types of projects, when dealing with expensive, real-time interviews with difficult-to-reach physicians, one cannot risk the technological issues that can arise from multiple product integrations.

The last thing you want is to run into compatibility or compliance issues just as you are ready to launch your project or analyze your findings. Look for solutions that are providing a complete package under one roof.

A better way

In this article, we've addressed the areas most ripe for automation in qual research. Looking to the future, text analysis for digital coding of interviews will be important. While some text analysis applications are currently out there, they are early in their development stages. There's also a future where moderators will be able to conduct interviews in multiple countries without human translators. What we do know in the here and now is that physicians are begging for a better way and we must find it. The technology for automated qual – technology that makes qualitative research more manageable and agreeable for both researcher and physician – already exists.

All this adds up to innovation in qualitative research being an exciting new frontier for the life sciences industry. As life sciences market researchers, we must know which platforms to trust and then demand the best.

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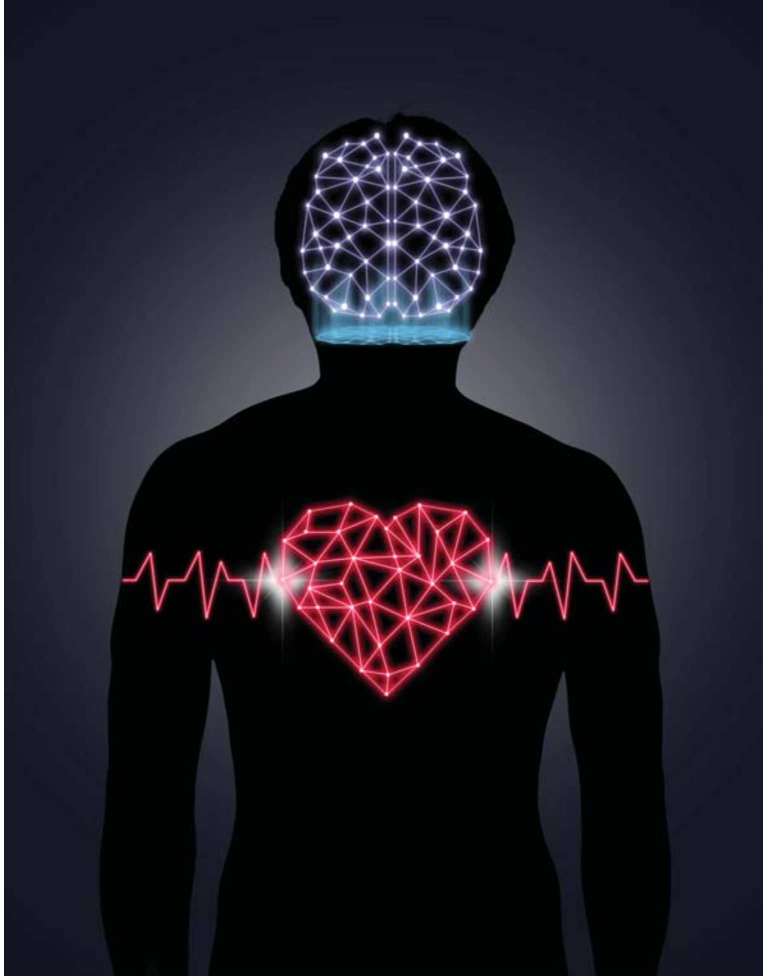
••• non-conscious measurement

Going beyond self-report

Making rational decisions about applying implicit tools

| By Jason Martuscello



snapshot

Jason Martuscello offers a guide to using implicit measurements (non-conscious, System 1, emotion, etc.) and charts their future.

Every week, I go to dinner with a good friend. Like most predictable aspects of life, we eat at the same restaurant, at the same time and we always take his Audi Q5 hybrid because hybrids get privileged parking in Miami. One evening on our way to dinner, everything was going as planned until his car broke down. Putting aside my initial concerns about my empty stomach, my attention went to trying to understand what was wrong with the car. We were not out of gas and the battery had 3/4 charge so I was unsure if it was an electric motor issue or a problem with the gas engine. We were hoping something smaller and less expensive like a spark plug or battery line.

Diagnosing my friend's car, in many ways, resembles the marketing researcher's role of understanding their customers. We have a business problem, we identify the cause and we implement the most cost-effective solution.

The rise of new implicit methodologies and technologies to help understand customers and deliver innovative solutions is both exciting and overwhelming. Exciting, knowing we can solve our problems faster and cheaper, yet overwhelming, as it is impossible and impractical to keep up with the advantages and disadvantages of all the new methods and figure out what is best for our situation. Making matters worse, navigating service providers is difficult at best. With every service solution claiming to have "the answer" – to capture the subconscious, to better predict behavior and to deliver results – how can we be confident in choosing the right solution?

This article seeks to bring clarity to the much-talked about implicit measurements by offering strategic guidance for their appropriate use and application in market research.

Frame our business question

Before digging into the subconscious and implicit methods, it's first important to frame our business question correctly. Framing the business problem, in many ways, identifies

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the service, solution or method to approach the problem with. When our car breaks down we don't start by replacing the car or the engine but instead we ask the right questions to isolate the problem. Likewise, consuming service providers without framing the question can limit the results or outcome of the research. For example, a simple framing of the business question, "Why are customers buying the competitor's brand over ours?" vs. "Why should consumers buy our brand?" completely changes the methodological approach to take.

Getting to the hearts and minds of consumers is simply not the job of self-report surveys. There is no doubt that these measures provide invaluable insights for market researchers while being inexpensive, accessible and easy to analyze but they are often not useful to explain why people experience what they do (e.g., do not reveal causal processes). Why do I buy Coke over Pepsi? Is it taste, price, color of the can or because my friends drink it? Many of the behavioral influences are simply beyond our awareness and cannot be obtained through traditional self-reports.

Growing interest among researchers in going beyond self-report (asking direct questions) has spawned the proliferation of implicit measurement tools. Psychological and biological tools, from eye-tracking to reaction-time methodologies, have become popular yet remain widely misunderstood and lacking in practical payoff. Here we will highlight what researchers need to know to make rational decisions applying implicit tools.

The goal of implicit tools is to understand behavior. They provide the means to understand why we do what we do. Are customers buying out of emotion, habit or social influence? Implicit measures attempt to capture the deeper psychological causes of social perception, judgment and behavior that are not easily accessible when asked about or through introspective experience. It is worth noting that implicit measures don't actually measure psychological causes (e.g., emotions or motivations) directly but rather infer what is happening inside our brain from people's biological responses or performance on experimental paradigms and tasks. For example, heart rate is a good proxy for emotional arousal but it does not indicate whether the arousal is good or bad for brand-buying, since arousal can be accompanied by excitement or anger.

"Implicit measures attempt to capture the deeper psychological causes of social perception, judgment and behavior that are not easily accessible when asked about or through introspective experience."

Takeaway: *Implicit measures are indirect assessments or tools that infer mental constructs (emotion, motivations, preferences, etc.) in ways different from asking direct questions.*

Two broad classes

For the purposes of market research there are two broad classes of implicit measurement tools: attitude-based and biology-based.

Attitude-based assessments, more widely known as implicit social cognition, are indirect assessments of attitudes. The effectiveness of attitude-based implicit assessments is rooted in the associative network theory, which holds that attitudes are stored and activated in memory and activation of a mental concept can spread to other concepts. Think "what wires together, fires together."

For example, if we are primed with the word "thirst" our brain can activate related concepts of "cold," "tasty" and, hopefully, "<insert brand name here>." These measures rely on associative links between concepts and their strength, which is assessed via reaction times. Although there are numerous attitude-based implicit tools, only two have demonstrated reliability (acceptable internal consistency): the implicit association test and the affect misattribution procedure.

Biology-based assessments include facial coding, eye-tracking, EEG/fMRI, galvanic skin response and heart rate and are indirect assessments based on our biology/physiology. Biology-based assessments rely on objectively measuring heart rate, eye movements, brain activations and facial movements to infer psychological states such as motivations, attention, preferences and emotions.

For example, if we watch consumers watch a Coke advertisement, changes in their facial muscles can allow us to draw inferences about emotions and increases in heart rate can help us understand arousal and ultimately make inferences about whether they liked the advertisement and would buy the product. Each biology-based assessment differs widely in its link to behavior.

What are we actually measuring?

Finding hidden truths, uncovering deep associations, overcoming biases and getting to the inner workings of human cognition are some of the frequently cited claims for implicit research methods. Putting the hype aside, what are we actually measuring?

If I ask you why you buy the toothpaste you do, your answer, although explicit, may likely be, "Because it's cheap" (price). Although price may indeed be true, there are likely six other brands within 10-15 cents and five inches of shelf space to your purchase, making it highly probable that other influences are involved in the decision.

Answers to direct questions are not pure measures of conscious processing (e.g., they involve unconscious processes) but the reciprocal is also true – implicit measures are not pure measures of unconscious processes. In other words, implicit measures will involve conscious processing (although in many instances the goal is to minimize conscious processing). The widespread assumption is that implicit tools capture the subconscious and although implicit tools overcome limitations of traditional methods, they should not be thought of as pure measures of unconscious processes.

Takeaway: *Implicit measures capture the less-conscious aspects of cognition.*

Seamlessly integrates

Just as hybrid cars seamlessly integrate gas and electric power, our brain seamlessly integrates conscious and non-conscious processes in executing decisions and behavior. System 1 vs. System 2 conceptualizations (e.g., non-conscious/conscious, implicit/explicit, direct/indirect, automatic/effortful, etc.), which neatly categorize mental processes into two distinct categories, are great for simplifying and communicating the complexity of cognition. However, if you are trying to understand how different cognitive and affective states influence behavior then we advise disaggregating consciousness into its component parts – control, deliberation, intention and effort. For example, a running habit may be automatic and conscious whereas the impulsive purchasing of candy at the cash register may require automatic, effortful control to avoid.

Takeaway: *System 1 and System 2 operate in tandem and researchers would benefit from understanding their respective contributions. By decoupling consciousness into its component parts – control, deliberation, intention and effort – researchers can better understand the drivers of behavior in various choice contexts and situations.*

Compared and contrasted

Implicit measures are often compared and contrasted against explicit measures, leading to the widespread assumption that implicit measures/tools are better than explicit self-report ones. Saying implicit is better than explicit is like saying a hammer is better than a screwdriver. Whether you are asking a direct question or using an experimental paradigm or tool to infer an answer, each method has its own unique strengths and weaknesses.

All too often, researchers and even scientists, both confidently and incorrectly, assume that implicit tools just work better. Or perhaps because "everyone else" is using implicit measures so should I. This is simply unsound science. As Philip Tetlock says, "Popularity is a poor proxy for utility."

Takeaway: *Avoid casting a halo around implicit measurements; know when they are superior. Also, avoid comparing explicit vs. implicit as we may lose sight of when to apply them and how to extract value from them. Use explicit and implicit to complement each other.*

Isolate relevant and effective methods

When my friend's Audi broke down, we didn't go to the dealership and replace it or drop in a new engine. Instead, we determined the problem and identified the parts and found the professional for the repair. In the market research world, our objective is no different: identify the problem and isolate relevant and effective methods to help us solve for our business situation.

In many cases, well-designed self-report surveys can fulfill a company's information needs. Are self-reports perfect? No. Can they provide critical business insight in a timely and cost-effective manner? Yes.

With concepts like cognitive biases and human irrationality taking center stage recently, it is worth noting that people are real and can provide accurate answers to well-designed and structured surveys. Tremendous business value can be extracted by optimizing questionnaire design, with attention to detail in structuring response formats, ordering effects, question wording and preceding questions. People who claim self-reports are unreliable sources of information typically are misusing them, do not fully understand their limitations or are trying to sell you on implicit methods.

Here are five points to improve the validity of your self-reports. Ask if subjects reporting on their behavior can: understand the question; recall the relevant behavior; make an inference and judgment of the behavior; map their answer to the response format; and avoid editing their answers for reasons of social desirability.

Go deeper

The incremental value of implicit tools is generally to go deeper and beyond the capabilities of self-report. The two key limitations of self-report (outside of poor survey designs) are motivational distortions and lack of introspective access.

"Motivational distortions" simply means people are motivated to protect their image, please researchers or flatter themselves. We all have a social image and categories, products and questions that call into question our social image are prone to respondents editing their answers. For example, if I am a frequent Reese's candy and Coke consumer I may not want to reveal my true preferences so that I can be seen as adhering to the healthy eating trend.

"Lack of introspective access" is just a more scholarly-sounding way of saying, "We simply don't know or have an answer." We've all found ourselves moving around the grocery store filling our shopping carts, just buying without thinking. Of course we can ask why people buy their toilet paper but do they really know? Was it price or the Charmin bear on the packaging? The point is, people can always give an answer if you ask them a question but in many cases, they simply just don't know and may unwittingly express attitudes they do not have. They may be out of touch with, or simply unable to know, their own mind.

Strategic use of implicit tools requires attention to not only the benefits but also the limitations of each method. A good way to think of implicit tools is as supplements to self-report as opposed to direct replacements. Taking an integrated or multi-method approach can help extract key insights while keeping costs low. Implicit measures are tools in the toolkit and, when used correctly and in the right context, can help better understand, predict and change behavior.

Ask better questions

If you want better answers, ask better questions. Scientists have been identifying methodological innovations to increase the predictive capabilities of self-reports. For example, intention stability, motivational coherence and attitude ambivalence have been shown to better predict preferences, choices and behavior.

The temporal stability of an intention is the persistence of the intention or its durability. When intentions are stable (e.g., same over time) they are resistant to change and are better predictors of behavior. Several key factors make up intentions, including attitudes, norms and perceived behavioral control.

Motivational coherence is when these factors cohere or point in the same direction. The more coherent the basis of the intention, the stronger the intention-behavior consistency.

Attitude ambivalence is an attitude-behavior consistency measure. Ambivalence simply refers to mixed evaluative reactions or discrepancies in one's attitudes. Think of it like indecision, uncertainty, confusion or a form of conflict.

Significant differences likely exist

Some argue that people are unable to verbalize what they feel. Instead of asking if people can verbalize their emotions let's change the question and ask why they can't, because significant differences likely exist with how people categorize and communicate their emotional experiences.

Each individual has their own unique understanding and expression of emotions to navigate the world. Some people with low emotional knowledge may report emotional experiences at an abstract level (e.g., pleasure), where others with deeper emotional knowledge can differentiate emotional experiences at a more granular level (e.g., joy, excitement, arousal, interest). Herein lies an opportunity: identify those who have low emotional knowledge (low granularity) and build untapped emotion associations tied to your brand. Think of it as if you were a vocabulary teacher and instead of identifying and teaching words to increase a student's vocabulary you were identifying what emotions consumers do not know how to experience and start building new associations to these feelings. Simply put, help customers better connect with their emotions, show them how it feels to experience emotions they may not know how to experience. Tune them into their emotional selves.

Consider energy and ego depletion. Can you imagine making grocery-shopping decisions after a long day of grueling work as opposed to when you wake up fresh in the morning? Your shopping will likely be much different. Attitudes, emotions, memory, decisions and behavior are strongly tied to our self-regulatory resources (ego depletion). Our daily energy status is in constant flux and quantifying self-regulatory resources could increase the precision and accuracy of our measurement models. Moreover, identifying patterns in regulatory resources across a customer base can reveal new brand communication and behavior-change opportunities.

Consider behavioral spillovers. When we make more money we generally spend more money and when we exercise we tend to increase our eating. These are known as behavioral spillovers – when we perform a behavior in one domain it results in a subsequent downstream behavior. What is interesting about behavioral spillovers is that the causal attribution of the behavior is largely unapparent to the consumer, creating an interesting opportunity to influence. To understand behavioral spillovers, we need to take a step back and view how behaviors interact and form patterns in customers' lives across larger time spans (e.g., daily and weekly patterns).

One interesting approach we are applying is quantifying consumers' mental budgeting (how they mentally allocate money to subjective categories – groceries, entertainment, utilities, etc.) to understand implicit refresh periods and ultimately change purchase patterns. Quantifying behavioral spillovers is a hot new area in understanding global behavioral patterns to open up new terrain to connect consumer behaviors with our brands.

Consider context. Choices do not exist in a vacuum but are largely context-driven and highly susceptible to social influence. Attitude-based implicit assessments are generally devoid of context, whereas biology-based experiments may involve equipment that creates artificial environments. We need to start adding more behavioral realism by incorporating context into our designs to increase predictive validity and the ability to generalize results. Be creative!

Consider measuring the future to inform the present. Most research uses the past and present to passively predict future behavior whereas newer methodologies focus on quantifying the future to proactively change present behavior. With the majority of our thinking, feeling, decision-making and behaving causally moving into the future, there is significant opportunity to understand where customers want to go and lead innovative behavior-change efforts. By "future," I am not talking about lofty projections or far-sighted forecasts but rather systematically measuring implicit and explicit future cognitions that causally link to changing customer behavior.

For instance, instead of quantifying just how people feel now by reacting to a stimulus (immediate emotions) we are now measuring how consumers expect to feel (anticipatory emotions), which is a better predictor of behavior in decision-making under uncertainty, which in today's fast-paced environment is overwhelmingly frequent.

Shape the marketing landscape

I'll leave with a mention of the future of measurement: anticipation. Anticipation is positioned to shape the marketing landscape in the coming years based on the groundbreaking new findings in cognitive neuroscience, highlighting its power to pull customers into the future. While organizations have long focused on quantifying and curating customer experiences and memories, which both science and intuition tell us are bound to be forgotten, quantifying and building anticipation is becoming a new competitive advantage to grow brands, acquire customers and optimize customer experiences.

Remember: In life and business our opportunities for growth lie in the future. It is time we start measuring it.

Jason Martuscello is a business strategist at New York-based professional services firm BEESY. He can be reached at jason.martuscello@beesystrategy.com.

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12 TOP INTERVIEWING COMPANIES

Conducting interviews is one of the best ways to gain insight from consumers. This method of research has the potential to provide more in-depth feedback than other methods. It is important to choose the interview type – such as online, mobile, one-on-one, phone or in-depth – that fits best with your project.

These specialized companies can provide everything you need to help with your interviewing needs, including research professionals who are trained to ask the right questions to get the most valuable and accurate insights from respondents. Many companies also offer interviewing for various specialties, like medical, mall and executive interviewing. Along with providing the means to conduct interviews, these companies also offer additional assistance, whether that's by supplying interviewing software or writing the right questions to ensure both you and the respondent get the most out of the interview. For access to interviewing professionals and tools needed for successful interviewing, consider these companies.

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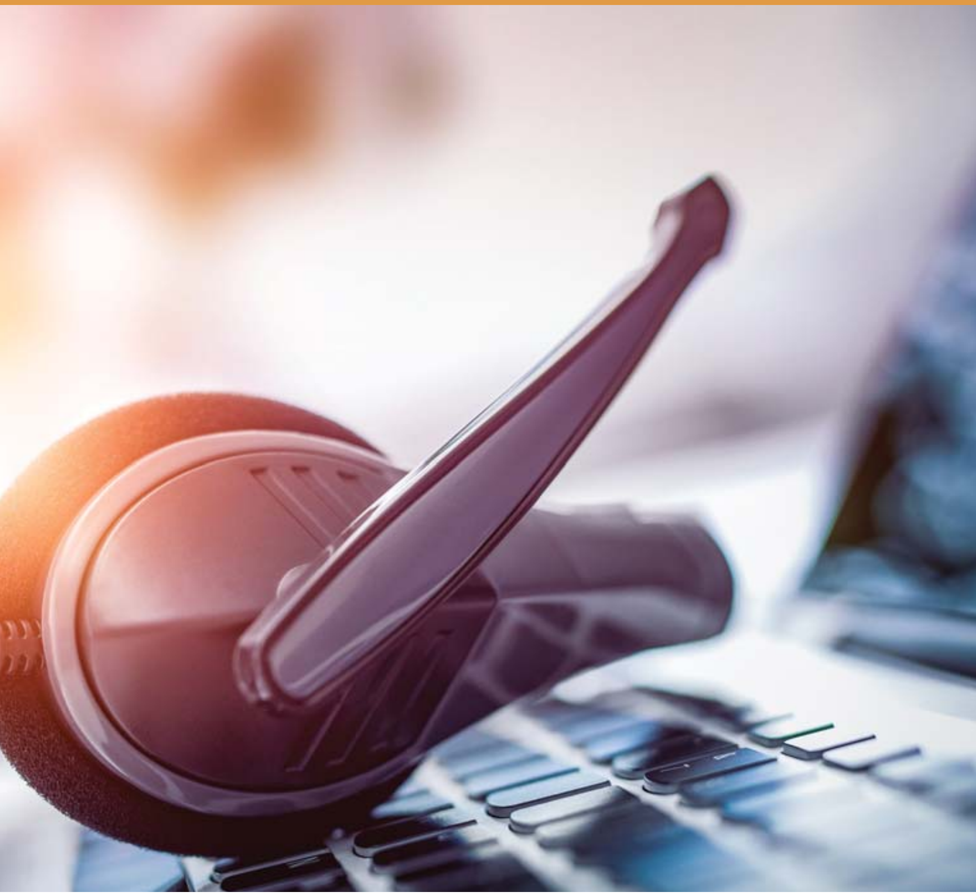
C&C Market Research

Founded 1992 | 700 employees
Craig Cunningham, President, and Cindy Cunningham, Vice President

C&C Market Research is the complete answer to all of your interviewing 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., with 44 geographically-dispersed offices. We've remained a leader in to-



day's marketplace through hard work, ingenuity and a dedication to quality. We also understand that technology has changed the way some interviewing practices are completed and we've adapted our practices to stay current. We have 100 mobile interviewing devices, a robust online database that stretches across all offices, gondola shelving and other items that assist with everything clients need.

Phone 479-785-5637
www.ccmarketresearch.com

Creative Consumer Research

Founded 1976 | 16 full-time; 60 part-time employees
Patricia Pratt, CEO

For more than 40 years, CCR's mission has been to provide clients accurate and actionable market research and consumer insights to help them make strategic decisions. This includes having expertise in telephone and Web-based quantitative research as well as focus groups, one-on-ones, mystery shops, on-site interviewing, in-store intercepts and store audits on a local, regional or national level. Our in-house staff can handle every aspect of any research project. CCR's capabilities encompass superior data collection and extend to precise data cleaning, insightful analysis and professional presentation. CCR works with a variety of industries, including health care, transportation, restaurant and entertainment, education and municipality, automotive and consumer goods. If you're looking for the most experienced research partner, contact CCR.

Phone 281-240-9646
www.ccrsurveys.com

Focus Latino

Founded 1996 | 6 employees
Partners Beatriz Noriega and Guy Antonioli

Originally specializing in Hispanic qualitative research, evolved to include multicultural research and quantitative fieldwork. Methodologies include focus groups, triads, dyads, IDIs, TDIs, ethnographies, as well as quant-qual w/dialers and mall or on-the-street intercepts. Conduct many in-depth telephone interviews with difficult-to-find participants – high-income individuals, executives, HIV and hemophilia patients in the U.S., Caribbean, Mexico, Central and South America. Beatriz, a psychologist, and Guy, a marketing, advertising and research professional, each have 40+ years of experience. Combined expertise and option of female or male moderator enable us to better uncover insights and provide actionable recommendations. Quality guaranteed because partners personally execute every project from beginning to end.

Phone 512-306-7393
www.focuslatino.com

GKSConsulting
Solutions through insight

GKS Consulting

Founded 2005
Gail Straus, President

The science of interviewing begins with the art of listening. GKS has listened closely to input from B2B, nonprofit and consumer audiences to develop insights that advance business goals. We have conducted interviews with diverse constituents including those in the workplace with financial managers, in homes with major donors and by telephone with high school counselors and pediatricians. Whether the goal is user testing, persona development, attitude and behavioral understanding or naming, principal and insight developer Gail Straus conducts interviews that get to the heart of client needs and interests.

Phone 847-571-3445
www.gksconsulting.com

ISA
DATA DRIVEN

ISA

Founded 1982 | 400 employees
Michael Halberstam, Chairman

Founded in 1982, the ISA Family of Companies includes Interviewing Service of America (225 CATI stations, full data processing and IVR services), Q-insights (specializing in qualitative, in-person and automotive clinics), SoapBoxSample (ISA's online division specializing in online sample, mobile and metering) and icanmakeitbetter (an integrated DIY insight community platform). ISA is a pioneer in multicultural research and one of the first companies to offer in-language interviewing beginning in 1983. ISA conducts over 1,500 projects annually, serving AMA Gold Top 50 market research firms, Fortune 1000 companies, research organizations, nonprofits, colleges and universities and consultants worldwide.

Phone 818-989-1044
www.isacorp.com

logit

Logit Group Inc.

Founded 1998 | 250+ employees
Sam Pisani, CEO

Our clients bring us projects of all types and sizes because we consistently work with them to achieve their research goals and enable them to focus on their part of the research process. We work quickly, efficiently and have quality assurance practices that exceed industry standards while maintaining a competitive pricing structure you can rely on. We believe in getting the job done right, on time and on budget. We specialize in online, phone and in-person interviewing. Some of our specialties include ethnic interviewing, B2B, international and political polling.

Phone 1-866-84-LOGIT
www.logitgroup.com

Maryland Marketing Source Inc.

Founded 1986 | 35 employees
Michelle Finzel, President

Maryland Marketing Source Inc. is a full-service market research company specializing in custom-designed quantitative and qualitative market research. What makes us different is also what makes us who we are – superior service, quality and reliability. We are a team committed to meeting your needs from the moment you request a bid until… well, there is no end to our commitment to you and we believe that's what makes our professional relationships so strong and long-lasting. Our CATI facility is state-of-the-art and available for local and national interviewing. We are certified as a minority/woman/small business enterprise in Maryland, Virginia and other municipalities. We are here to help.

Phone 410-922-6600
www.mdmarketingsource.com

Precision Opinion

Founded 1996 | 923 employees
James Medick, CEO

Precision Opinion is America's premier telephony data collection center located in the heart of Las Vegas. With 650 CATI stations that are Voxco-optimized and over 900 employees that have graduated from The Research Associate Masters Training Certification Program, Precision Opinion has been given the title of the Most Trusted Name in Market Research by their clients. The elite staff and the expert knowledge acquired from over 20 years in political and social science data collection has turned Precision Opinion into the go-to firm for today's market research needs. Contact us to discover the Precision Opinion Method.

Phone 702-483-4000
PrecisionOpinion.com/ThePOMethod

ReRez

Founded 2002 | 10 employees
Debbie Peternana, CEO

"If We Can't Do It, It Cannot Be Done!" ReRez specializes in online panel research and creative mixed-mode recruitment. Methodology consultants and online specialists accessing over 40 million globally. Niche organization offering a solution based on client needs. With 15+ years, a proven process, consistent management, a research background in addition to the common technology experience, we have achieved the perfect balance in key attributes, making our ability to "simplify complexity" greater than any other single company. Single point of contact using the right methodology to find low-incidence, DMs, IT, executives, health care, B2B, B2C. Programming, fast turnaround and flexible pricing.

Phone 774-212-0033
www.rerez.com

Voxco Survey Software

Founded 1976
Vincent Auger, VP of Sales

Voxco is a global leader in survey interviewing software. Our unified multimode platform includes capabilities for phone surveys (Voxco CATI), field surveys (Voxco Mobile offline) and mixed-mode surveys. Our clients manage thousands of interviewers every day, so Voxco understands the importance of optimal interview sessions to control project costs. With a wide range of features, the Voxco system ensures that your interviewers are productive for every survey and gives you control over interview quality. Our survey system is designed for all types of interview sessions, including surveys at events, in schools, of households or shopping intercept.

Phone 514-861-9255
www.voxco.com

Watermelon Research

Founded 1985 | 1,250+ field operatives, 100+ market research experts
Mark Squires, CEO

Watermelon Research is a leading U.K. field research provider offering telephone, face-to-face, online, mobile, IVR and mystery shopping services. With multiple awards for data collection and innovation, our experience spans financial, energy, utility, transport and retail markets. Specializing in B2B, B2C and opinion polling, our in-house capabilities include a 200-seat CATI center providing multilingual and sector specialist interviewers, a nationwide personal interviewing team of face-to-face and mystery shopping professionals and a large team of market research, data processing and project management experts. Our 30-year history covers 40 global markets and every client receives bespoke, agile and completely scalable solutions.

Phone: +44 (0) 1233 648 530
www.watermelonresearch.com

Zebra Strategies

Founded 2000 | 9 employees
Denene Rodney, CEO

Zebra Strategies is a full-service marketing research firm that provides respondent recruiting, research analysis and street intercept work (Money4Talk and NYCIntercept) for private, government and nonprofit entities. Established in 2000, ZS provides research solutions, offering underrepresented and marginalized populations a voice. We help underserved communities be heard, including, among others, diverse groups such as low literacy, LGBTQ, immigrant, non-English speaking (including Spanish, Chinese and Russian populations, in their native language). We meet each person "where they are" and clients appreciate our ability to give voice to the voiceless.

Phone 212-244-3960
www.zstrategies.net
www.money4talk.com
www.nycintercept.com

Names of Note

■ Los Angeles-based holding company *The Wonderful Co.* has formed a marketing and insights team, part of Wonderful Agency, its in-house advertising and marketing agency. The department is led by **Amy Snow**, who serves as head of market research and consumer insights and reports to Wonderful Agency President **Michael Perdigao**. Team members include **Kate Hartzell**, director of research and consumer insights, **Alec Bardzik**, senior manager of strategic insights and **Erin Harumi Lee**, manager of consumer insights.

■ *Intex Technologies*, an Indian mobile and consumer electronics companies, has named **Rajiv Bakshi** as CMO. Marketing research will be among his responsibilities.

■ New York research firm *maslansky + partners* has opened a new office in Sydney and appointed **David Baynham** to the new role of managing director of APAC.

■ New York-based market research firm *GBH Insights* has launched its first international office, in London. In support of the London office opening, the firm appointed **Mark Connolly** as a non-executive director and member of the GBH advisory board.

■ Reston, Va., research firm *comScore* has appointed **Bryan Wiener** as CEO. Wiener is currently a member of the firm's board of directors. In addition, **Rob Norman**, former chief digital officer of WPP's GroupM, has been named to the comScore board of directors and current board member **Brent Rosenthal** has been named non-executive chair.

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■ *Directions Research*, Cincinnati, has added **Howard Lax** as vice president, customer experience practice lead.


Lax

■ Australia-based digital retail out-of-home media business *Shopper Media Group* has appointed **Emily Sak** to the newly created position of head of data and insights.

■ Enterprise feedback management firm *Questback* has added **Marc Oetzel** as general counsel and **Sara Habberstad** as privacy counsel in support of the firm's GDPR compliance.

■ Durham, N.C., research firm *W5* has promoted **John Capps** to senior practice consultant.


Capps

■ *MMR Research Worldwide* has named **Simon Williams** head of agile to drive innovation in consumer and sensory research.

■ TV technology provider *Amino* has named **Jamie Mackinlay** as its new global VP of marketing.

■ Mobile data company *Ogury* has tapped **Elie Kanaan** to be its CMO.

■ Media agency *Spark Foundry* has appointed **Shula Sinclair** to the newly created role of global head of strategy to oversee product output and strategic thinking across EMEA, MENA and APAC.

■ St Petersburg, Fla., software firm *Community Brands* has named **Rick Bradberry** as CMO.

■ Dallas toy and juvenile products maker *KidKraft Inc.* has appointed **Debra Berman** to CMO.

■ New York research firm *Lightspeed Health* has named **Rachel Bear** new associate director, business development.


Bear

■ *Tivity Health Inc.*, a Franklin, Tenn., provider of fitness and health improvement programs, has named **Arra Yerganian** to the newly created role of chief brand officer.

■ Research firm *InnovateMR*, Encino, Calif., has named **Michael Anderson** president.


Anderson

■ Warren, N.J.-based research firm *Lightspeed* has named **Jason Dodge** to the newly created position of senior vice president, data solutions.

■ *Gamida Cell*, a cellular and immune therapeutics company, has named **Paul Nee** as vice president, marketing. Marketing research will be among his responsibilities.

■ Enterprise feedback management firm *Questback* has added **Marc Oetzel** as general counsel and **Sara Habberstad** as privacy counsel in support of the firm's GDPR compliance.

■ *McGraw-Hill Education* has reached into the world of data analytics to tap its new president and CEO, naming **Nana Banerjee** to the post.


Snapp

■ Research firm *Smarty Pants* has added **Suzanne Snapp** as insights genius. She is based in metro Indianapolis.

■ Seattle-based software firm *Zipwhip* has named **Scott Heimes** CMO.

■ *Covenant Transport Services*, Chattanooga, Tenn., has promoted **Clara Min** to director of advanced analytics.

■ *Lieberman*, Great Neck, N.Y., has named **Ann Bracken** as senior vice president of its quantitative practice.

■ **Amit Shah** has joined India-based media company *Zee Entertainment Enterprises* as cluster head – Regional Hindi Speaking Markets (RHSM). In his new role, he will manage the RHSM business along with programming, content, marketing and the research and insights team.

■ *Zespri* has hired **Raul Murguia** as head of marketing-Americas, a newly created position for the New Zealand kiwifruit marketer.

■ Sweden-based research firm *Norstat Sverige AB* has added **Erik Tageson** as a sales and marketing director in the Swedish market.

■ Media planning firm *Initiative* has appointed **Michael Storms** to U.S. chief analytics officer, a new position at the IPG Mediabrands agency. In his new role, Storms will head up the agency's culture, insights and analytics business unit, which includes the agency's accountability and business intelligence operations (segment creation, campaign oversight, audience measurement); marketing science (modeling and attribution) and audience research.


Hunter

■ **Alex Hunter** has joined U.K. research agency *DRG* (Dipsticks Research Group) as research director.

■ Non-profit organization *Women in Research* (WIRe) has added three new members to its advisory board: **BV Pradeep**, VP CMI for country and customer development for Americas and Europe in the new C4G organization at Unilever in London; **Joanna Derry**, head of consumer insights and marketplace intelligence for Nestlé Oceania Limited, Sydney; and **Pratiti Raychoudhury**, a director of research for Facebook in Menlo Park, Calif. After completing a two-year service term, advisory board members **Anthony Michelini**, **Eric Salama**, **Jane Frost** and **Marie-Agnes Mourot de Lathyle** will transition to emeritus board members.

■ **Sarah Bolger** has been named head of New Zealand research firm *Colmar Brunton*, replacing **Jason Shoebridge**, CEO of Kantar New Zealand, Colmar Brunton's parent company, who had been acting in the role since his appointment in February 2016. Bolger was formerly chief client officer.

■ Research firm *Kadence International* has launched its New York office and has tapped **Lee Abbas** as managing director in charge of building and developing the office.

■ **Kari Peglar**, previously senior consumer insights strategist, has been promoted to manager of consumer insights and analytics at ad agency *Young & Laramore*.

■ *Martec Research Center*, Green Bay, Wis., has hired **Hillary Zank** as its new call center manager, while **Brenda Brown** has been named the new marketing manager. **Linda Segersin**, director, and **Mary Prisco**, data processing manager and statistician, will celebrate 15 years with the firm in July.

■ Media sales organization *Katz Media Group* has appointed **Stacey Lynn Schulman** to CMO. In her new role, she will lead a team of marketing and insight professionals across both Katz Radio Group and Katz Television Group.

■ Atlanta management consulting company *Ascension Growth and Innovation Strategies* has added three staff members, naming **Lynn Gutstadt** marketing research director, **David Kudon** chief research officer and tapping **Artie Ruderman** for business development.

■ U.K. research firm *Join the Dots* has appointed **Mallory Salerno** as business development director to support its drive to promote and increase its business in the U.S.

■ New York research firm *maslansky + partners* has opened a new office in Sydney and appointed **David Baynham** to the new role of managing director of APAC.

Research Industry News

News notes

■ Publishers Daily reports that **Trusted Media Brands**, which owns titles such as *Taste of Home* and *Reader's Digest*, has formed an Insights Lab to provide brand marketers with data and information on consumer and B2B audiences and marketing trends. The lab will also use national panels from research partners and the Trusted Media Brands Inner Circle community of 3,500+ online members "to drive understanding of the changing habits, attitudes and behaviors of the American consumer and today's media landscape," said company CEO Bonnie Kintzer.

■ **The University of Michigan's Ross School of Business** has announced a new data and business analytics concentration for its full-time MBA (FTMBA) degree program. The new concentration will be offered beginning in fall 2018.

Acquisitions/transactions

■ Sweden-based research firm **Norstat Sverige AB** has acquired Sweden-based data collection company **Concilia**'s Web panel. The panel, consisting of randomly telephone recruited active members, will be added to Norstat's online panel, panel.se. In addition, effective July 1, the two owners and founders of Concilia, CEO Per Jansson and CEO Torbjörn Månsson, will also start working for Norstat.

■ Israeli technology company **NICE Systems Ltd**. will acquire U.S. cloud-based analytics company **Mattersight** to further enhance its offerings and customer base. NICE will offer to purchase the outstanding share capital of Mattersight for $2.70 per share, a 25 percent premium on the Chicago-based company's share price, for a total of $90 million.

■ Canadian pollster **Angus Reid** has acquired the **Your Insights panel**, formerly owned by **Insights West**. Effective immediately, the panel will be known as the Angus Reid Forum. Reid will be chairman of the board of the new entity. Insights West Founder Steve Mossop will become president and CEO, leading a Canada-wide team of researchers and panel managers.

Alliances/strategic partnerships

■ **Research Now SSI** has formed a partnership with voter data firm **Aristotle International** to offer pollsters, PACs, public opinion groups and nonprofits behavioral and modeled variables to connect with verified registered American voters to conduct opinion polling via online and CATI modes. Aristotle's national voter file contains more than 500 attributes such as voting and donor histories, political party registration and affiliation, hobbies and more. Separately, Research Now SSI also announced a partnership with **Data Trust**, a voter file and data management company, to enable more accurate online polling leveraging Data Trust's voter data. The new offering allows pollsters to merge Research Now SSI's online political survey responses with responses from the Data Trust voter files.

■ Marketing analytics firms **Truesight Consulting**, New York, and **Marketscience Consulting**, London, have launched a strategic development partnership under which they will deliver a suite of new unified demand analytics solutions and services to the marketplace.

■ Research firm **PersonaPanels** has joined the **Nielsen Connected Partner Program**. Working with **Tanjo Inc.**'s machine learning platform, PersonaPanels creates populations of simulated consumers for research panels that can provide continuous feedback to companies and marketers.

■ **B-CITI**, a software platform for connecting cities and residents, and Canada-based research firm **Leger** are partnering to integrate Leger Metrics into the B-CITI platform to give users global management and integration of digital data; real-time measurement of residents' satisfaction; and integration and artificial intelligence for data management.

■ Insight platform **Voxpopme** announced new partnership integrations with technology platforms **Delvinia**, **Digsite**, **Invoke Solutions** and **Protobrand**. Delvinia will offer Voxpopme video insights in the Canadian market through its AskingCanadians panel and also offer Voxpopme video insights in North America through its Methodify research automation platform. Digsite adds Voxpopme to its qualitative Sprints and online communities. Under the agreement, Invoke Solutions adds video-based input to get insights from consumers in real time. And Protobrand adds video-based open response questions to its Meta4 Insight methodology.

www.quirks.com/articles/2018/20180714.aspx

Association/organization news

■ **The Insights Association**'s new Code of Standards and Ethics for Marketing Research and Data Analytics was unanimously approved by members and the association's board of directors. Adherence to this enforceable code is required by all members of the Insights Association. "Our new code builds on the industry standard-setting legacies of CASRO and MRA while reflecting many recent changes in research process and practice," said David W. Almy, CEO of the Insights Association. "It plays a vital role ensuring ethical behavior and best practices beneficial to research participants, the pubic, our members and the entire research and insights community." The code was developed over the past year by a task force and refined in consideration of suggestions and comments from members. It is designed to feature concise, plain language and to cover all research and insights activities. It reflects changes in research and insights practice in a global context, while relying on supplemental guidance by ESOMAR/GRBN, EphMRA and other research and insights resources.

■ **The Data & Marketing Association** (DMA), the Advertising Research Foundation (ARF) and the Coalition for Innovative Media Measurement (CIMM) are joining with 15 DMA member companies to develop, test and adopt standards for audience data quality and transparency. The initiative, which is being spearheaded by DMA's Council for Data Integrity, is designed to help marketers, agencies, data providers and publishers identify and make better decisions on high-quality, responsibly-sourced data. DMA aims to deploy a standard data label – much like an FDA-approved nutrition label – that displays data segment ingredients in a simple and transparent fashion.

■ Non-profit organization **Women in Research** (WIRe) has added three new members to its advisory board: BV Pradeep, VP CMI for country and customer development for Americas and Europe in the new C4G organization at Unilever in London; Joanna Derry, head of consumer insights and marketplace intelligence for Nestlé Oceania Limited, Sydney; and Pratiti Raychoudhury, a director of research for Facebook in Menlo Park, Calif. After completing a two-year service term, advisory board members Anthony Michelini, Eric Salama, Jane Frost and Marie-Agnes Mourot de Lathyle will transition to emeritus board members.

Awards/rankings

■ Toronto-based research firm **Sklar Wilton & Associates** was named a Best Workplace for Women by the **Great Place To Work Institute** and placed 11th in Canada as a Best Workplaces - Fewer than 100 Employees. This award builds on wins in 2017 for both the Best Workplace in Canada for Small Companies as well the Best Workplace for Celebrating Success.

■ **Market Strategies International**, a Livonia, Mich., research firm, announced that it has earned Certified status for information security by **HITRUST**, an information management and security organization.

■ New York-researcher **Nielsen** has earned the #19 ranking on the **2018 DiversityInc Top 50** list for corporate diversity and inclusion, moving up 13 places. This is Nielsen's fifth consecutive year moving up on the annual ranking of companies that excel in hiring, retaining and promoting women, minorities, people with disabilities, LGBT+ and veterans.

■ Research software firm **Confirmit** announced the winners of the 2018 Confirmit ACE (Achievement in Customer Excellence) Awards, which recognize clients who demonstrate "proven excellence and innovation" in their customer experience programs. Categories and winning organizations include: Voice of the Customer: AIG Travel, ANSYS, Asurion, Authorize.net, Cybersource, Deltek, Empire Today, Grainger, NCR: DI University, NCR: Digital Insight Software Solutions, HMS, Infor, McKesson, Moore Medical, OpenText, Philadelphia Insurance Companies, PODS Enterprises LLC, Quest, Selective Insurance, Siemens Building Technologies, The Hanover Insurance Group, Virgin Money, Visma, Waters Corporation, Wyndham Vacation Resorts Asia Pacific. Voice of the Employee: Accenture, Cognita, ENGAGE with Moss Bros.Business Impact: ANSYS, Kongsberg Digital, The Hanover Insurance Group, Virgin Money, Visma, Wyndham Vacation Resorts Asia Pacific. B2B: Amadeus, B2B International, Grainger, HMS, OpenText, Visma. Innovation: Amadeus, CSAA, HMS, Philadelphia Insurance Companies, Rockbridge Associates Inc., W5 with DEASP. Multi-Channel: Cognita, Grainger, Erie Insurance, Wyndham Vacation Resorts Asia Pacific.

New accounts/projects

■ **Nielsen** announced that yogurt maker **Chobani LLC** has selected the Nielsen Data Management Platform (Nielsen DMP) for its cross-screen media campaigns across connected TV (CTV), online video and programmatic channels. Additionally, Nielsen's multi-touch attribution (Nielsen MTA) capabilities will help Chobani measure and optimize its media and marketing ROI.

■ The government of **Tanzania** has endorsed Denver-based research firm

GeoPoll for research services in Tanzania, with an office address in Dar es Salaam.

New companies/new divisions/relocations/expansions

■ Pittsburgh research firm **Olson Zaltman** announced a new health division. The firm discovered that the mind has a single, universal orientation to health and created, after an audit of over 140 health care studies, its Deep Metaphor Health Framework, which is designed to allow marketers and strategists to tap into the orientation.

■ **Kantar** announced the launch of an analytics practice that will unify a global network of over 1,500 data scientists, analytics consultants, technologists and data designers from across Kantar businesses such as MaPS and Analytics Quotient. In India, WPP has combined the analytics teams from Kantar and GroupM to form one combined practice.

■ Katie Harrison, Sheila Roche, Erin Thornton and Jenifer Willig have created **Hive**, a New York-based social impact consultancy.

■ Elys Roberts, previously U.S. CEO of Ipsos Marketing Practices, has launched **BEESY**, a Summit, N.J.-based company bringing together a team of behavioral scientists, consumer insights professionals and marketing strategists to serve clients in CPG, financial services, biopharma/health care and other industries.

■ U.K.-based **Explain Market Research** has expanded into Scotland after securing new client wins. The company has added Scottish Water and SGN to its portfolio of clients in the utilities sector.

■ New York research firm **maslansky + partners** has opened a new office in Sydney and appointed David Baynham to the new role of managing director of APAC.

■ New York-based market research firm **GBH Insights** has launched its first international office, in London. In support of the London office opening, the firm appointed Mark Connolly as a non-executive director and member of the GBH advisory board.

Research company earnings/financial news

■ Three employees of **Vernon Research Group** have purchased the marketing research firm from Cedar Rapids, Iowa-based holding company **Folience**, which acquired the company in 2013. *The Corridor Business Journal* reports that Lori Dockery, Andrew Juhl and Linda Kuster have closed on the deal, with an effective ownership date retroactive to April 1. The company will continue to do business as Vernon Research Group, operating from its Cedar Rapids office.

■ New York-based **Nielsen Holdings plc** announced its first-quarter 2018 results. Revenues were $1,610 million for the period, up 5.5 percent, or 2.4 percent on a constant currency basis, compared to the first quarter of 2017.

■ **MR2 Group**, a market research and consulting firm operating under the Precision Opinion brand, filed with the SEC to raise up to $18 million in an initial public offering. The Las Vegas-based company was founded in 2007 and booked $16 million in revenue for the 12 months ended December 31, 2017. It plans to list on the Nasdaq under the symbol MRMR. ThinkEquity is the sole book-runner on the deal. No pricing terms were disclosed.

■ Paris-based researcher **Ipsos** reported revenue of €367 million in the first quarter of 2018, down 5.9 percent from the first quarter of 2017. In the absence of any scope effect, this change was driven by currency effects, the company said. Organic growth had a positive effect of +2 percent and the transition to IFRS 15 had an impact of +0.4 percent. The increase in the organic growth is an improvement on the first three months of 2017 (+1 percent). It is weaker than in the second half of 2017, which had seen organic growth rates of more than 4 percent, in part, as the company had indicated in July, due to the closing of the gap observed in mid-2017 between stable revenue and a rise in the value of contracts sold.

■ Reston, Va.-based **comScore Inc.** reported financial results for the first quarter of 2018, ended March 31. Revenue advanced 5 percent year-over-year to $105.9 million from $100.9 million reported in the same period for 2017. GAAP net loss for the first quarter of 2018 was $51.5 million, or $(0.93) per share as compared to $40.8 million, or $(0.71) per share reported in the same period for 2017. On a non-GAAP basis, net loss for the first quarter of 2018 was $13.8 million, or $(0.25) per share, excluding investigation and audit-related expenses, stock-based compensation expense and certain other items. This compares to a non-GAAP net loss of $17.7 million, or $(0.31) per share, reported in the same period for 2017.

■ Stamford, Conn.-based research and advisory company **Gartner** reported first-quarter 2018 earnings per share of $0.72 on an adjusted basis, beating the Zacks Consensus Estimate of $0.58. Earnings also increased 20 percent on a year-over-year basis. Revenue was $973 million in the first quarter, up 16 percent. The average spend reached $191,000 per business enterprise, up 5 percent.

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CALENDAR OF EVENTS

••• can't-miss activities

Marcus Evans will hold its 2nd Edition Internal Branding and Employee Experience on **August 8-9** in **Chicago**. Visit bit.ly/2sowFmX.

AMA will hold its 2018 Summer Academic Conference on **August 8-12** in **Boston**. Visit www.ama.org.

NMSBA will hold its Shopper Brain Conference - South America event on **August 30-31** in **Rio de Janeiro**. Visit bit.ly/2j3FGR1.

RSS will hold its 2018 International Conference on **September 3-6** in **Cardiff, Wales**. Visit bit.ly/2xDKLSb.

Merlien Institute will hold its MRMW Europe 2018 event on **September 5-6** in **Stockholm**. Visit eu.mrmw.net.

IQPC will hold its Customer Experience Automation event on **September 5-7** in **San Jose, Calif.** Visit bit.ly/2FbF9q2.

IQPC will hold the Digital Marketing and Consumer Insights Exchange on **September 23-25** in **Chicago**. Visit bit.ly/2xnVfdB.

ESOMAR will hold its 2018 Congress on **September 23-26** in **Berlin**. Visit www.esomar.org.

Insights Association will hold its CEO Summit London on **September 26-28** in **London**. Visit bit.ly/2JiNJ8N.

Pharma CI Conference and Exhibition USA will be held on **September 26-27** in **Newark, N.J.** Visit bit.ly/29Igdaa.

AMA will hold its 2018 AMA Marketing Week Live event on **October 3-5** at Caesars Palace in **Las Vegas**. Visit www.ama.org.

Insights Association will hold the 2018 Corporate Researchers Conference (CRC) on **October 8-10** in **Orlando, Fla.** Visit bit.ly/2zuhH3Z.

Merlien Institute will hold its Qual360 Asia-Pacific 2018 event on **October 10-11** in **Singapore**. Visit apac.qual360.com.

KNect365 (IIR) will hold the 2018 Market Research Event (TMRE) on **October 16-18** at the Westin Kierland Resort and Spa in **Scottsdale, Ariz.** Visit bit.ly/2dp2JxE.

KNect365 (IIR) will hold its Back End of Innovation event on **October 17-19** in **Phoenix**. Visit bit.ly/2dxOcB8.

Society of Insurance Research will hold its 2018 Annual Conference and Exhibit Fair on **October 21-23** at the Hotel Monteleone in **New Orleans**. Visit bit.ly/2FBFvUV.

AMA will hold its Digital Marketing Bootcamp on **October 22-23** in **Chicago**. Visit www.ama.org.

Research & Results will hold its 2018 trade show on **October 24-25** at the MOC Convention Center in **Munich**. Visit bit.ly/2FAo86I.

LIMRA will hold its 2018 Annual Conference on **October 28-30** at the New York Marriott Marquis in **New York**. Visit www.limra.com/annual.

KNect365 (IIR) will hold its FUSE Europe event on **October 29-31** in **Amsterdam**. Visit bit.ly/2LI9X23.

KNect365 (IIR) will hold its Shopper Insights and Retail Activation International event on **October 29-31** in **Amsterdam**. Visit bit.ly/2H2BlEr.

Insights Association will hold the Insights Leadership Conference on **November 5-7** in **San Diego**. Visit bit.ly/2CNvWyR.

NMSBA will hold its 2018 Shopper Brain Conference – Europe event on **November 7-9** in **Amsterdam**. Visit bit.ly/2vvGfUL.

ESOMAR will hold its FUSION 2018 event on **November 11-15** in **Dublin**. Visit bit.ly/2qwITcn.

Pharma CI Conference and Exhibition Asia will be held on **November 15-16** in **Tokyo**. Visit bit.ly/2L2Q5pg

KNect365 (IIR) will hold its Media Insights and Engagement Conference on **January 29-31** in **Los Angeles**. Visit bit.ly/2eyPzmx.

Pharma Market Research Conference USA will be held on **February 6-7** in **Newark, N.J.** Visit bit.ly/1Sh6Yhi.

Quirk's will hold the 2019 Quirk's Event – **London** on **February 12-13** at the Intercontinental 02 in London. Visit www.thequirksevent.com.

Quirk's will hold the 2019 Quirk's Event – **New York** on **March 5-6** at the Marriott Brooklyn Bridge in Brooklyn, N.Y. Visit www.thequirksevent.com.

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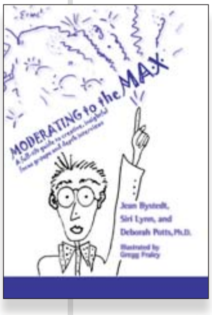

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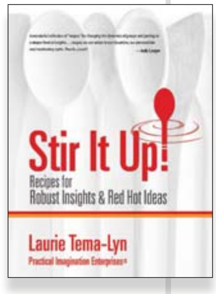

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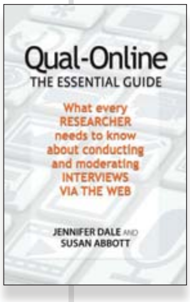

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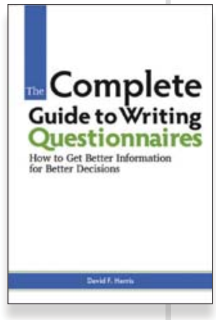

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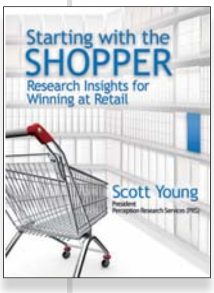

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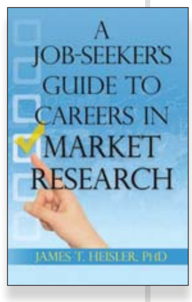

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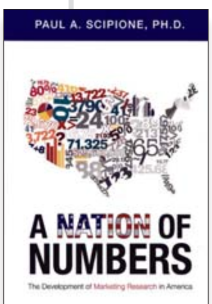

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10 minutes with...

Sarah Shain
Shopper Insights Analyst, Red Bull

"We present each project with its own story and narrative, providing context for what we see as behavioral experts and how the team can implement the insights in store."

Tell us about your journey to your current position at Red Bull.

While I've always been interested in human behavior, I never foresaw myself doing market research. My undergraduate major was in political science and I started my career working in politics in Washington, D.C. After shifting to marketing at a cosmetics company I became interested in consumer psychology. This led me to my master's program at USC, which was a unique blend of data analytics coursework layered with psychological theory and research methods. While at USC I worked in shopper insights at Mattel. I learned the basics of what it means to be a retail-focused researcher on a lean team at a massive CPG company. Right after I received my master's degree, I was recruited by Red Bull to join the shopper insights team.

What tips do you have for marketing researchers managing their first online community?

Be prepared to invest time into the community. You will get the most out of it when you engage with the members and share results back with them. While time-consuming, it's worth it. Additionally, I've found success by making our surveys very user-friendly. I keep the point scales and grids to a minimum; always keep the length of the survey in mind; and use casual, informal language – and memes where necessary – to keep our community members interested. I'm constantly asking myself, "Would I want to take this survey and actually finish it?"

How do you ensure research outcomes are seen as actionable by your team at Red Bull?

Our team is part of the sales organization so it is very important that our research has clear takeaways and are actionable in-store. We stay in constant communication with our sales team in the field so we are aware of our retailers' needs and challenges, ensuring that we can be the best partners for them and create the best experience for the Red Bull shopper. We present each project with its own story and narrative, providing context for what we see as behavioral experts and how the team can implement the insights in-store.

What are some of the day-to-day challenges you face as a researcher?

My biggest challenges are managing the various projects we are working on at any given time, while simultaneously giving our online community as much attention as possible. I am also always challenged to find new and creative ways to ask questions that shoppers are able to answer – the human mind is so complex that we as consumers often aren't able to articulate why we do what we do.

Read the full interview at www.quirks.com/articles/2018/20180722.aspx.

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