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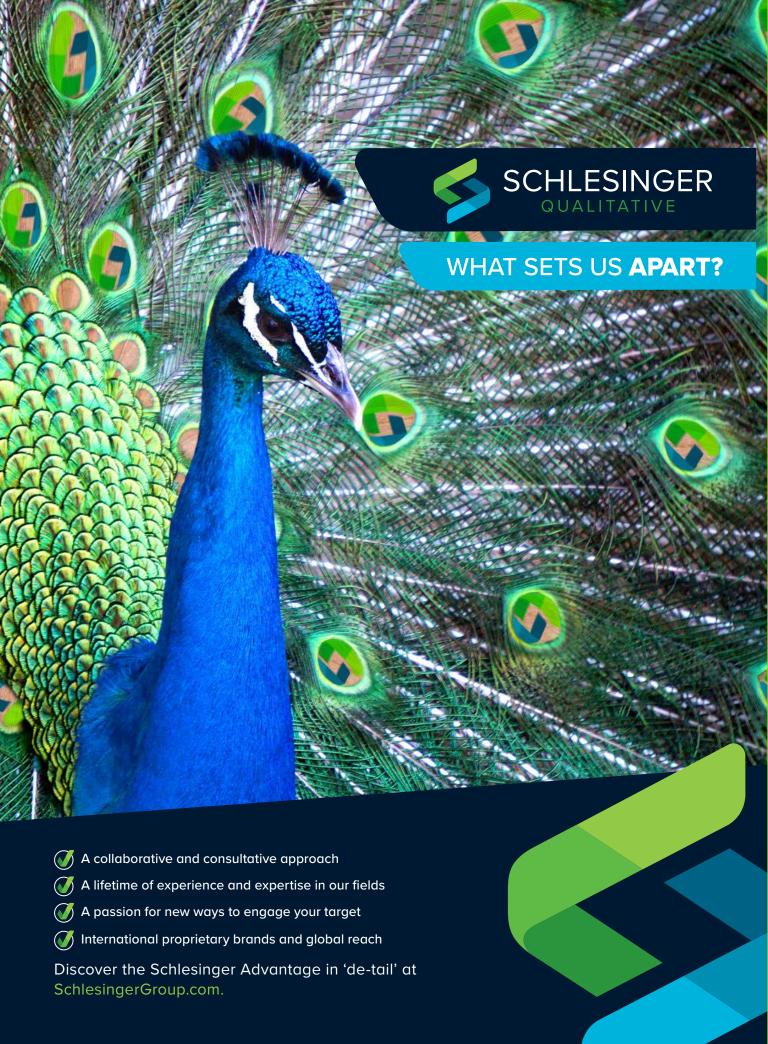
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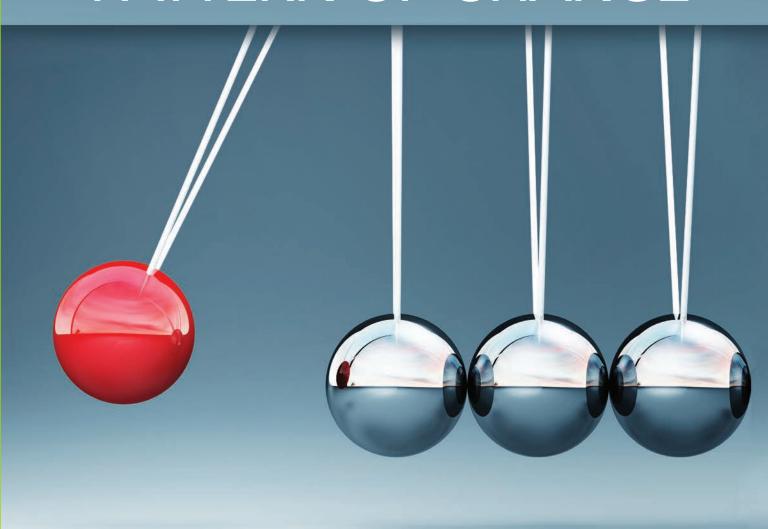
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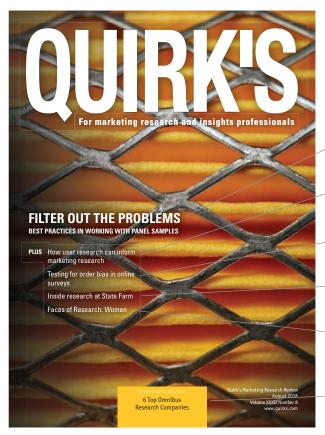
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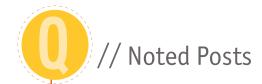
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••• coming soon

Speak at the 2019 Quirk's Events

re you a client-side (corporate) re-A searcher with a story to tell or a lesson to share? Consider speaking at the Quirk's Event! In 2019 the Quirk's Event will be held in three locations: London, February 12-13; Brooklyn, N.Y., March 5-6; and Chicago, April 2-3. Each location will offer attendees educa-

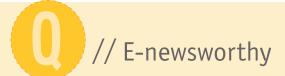


tional workshops on a multitude of topics and subjects. Sessions are 30 minutes long and can cover almost any topic you think would be of interest to your MR peers.

Here are just a few of the companies that participated in past Quirk's Events:

Bose Etsy General Motors Facebook L'Oréal The Clorox Company BuzzFeed American Family Insurance Progressive Insurance

Visit www.thequirksevent.com to fill out our pre-registration form or contact Steve Quirk at steve@quirks.com to learn more about speaking at the event.



Legal cannabis and MR: Recruiting

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To know what we know, please contact us at 248-786-1683 or info@clearseasresearch.com



••• health care research

Doctors worry about bad online reviews

n a survey of 200 health care professionals, 80 percent rated their online $oldsymbol{1}$ reputation as very or extremely important and 90 percent expressed concern about the risks of negative feedback. But only 46 percent of respondents were planning to put resources toward improving that reputation in the next year. The survey was commissioned by Pa-

tientPop, a digital health company. Respondents were most likely to see their reviews on Google or Healthgrades, with 46.5 percent seeing their reviews on each of those sites. Yelp trailed just

barely with 45.8 percent and Facebook came in at 37.3 percent.

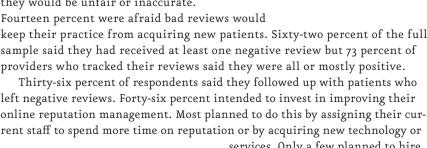
Providers worried about negative reviews for a number of reasons. Forty percent feared they would give people the wrong impression of their practice. Thirty percent feared they would be unfair or inaccurate.

keep their practice from acquiring new patients. Sixty-two percent of the full sample said they had received at least one negative review but 73 percent of providers who tracked their reviews said they were all or mostly positive.

Thirty-six percent of respondents said they followed up with patients who left negative reviews. Forty-six percent intended to invest in improving their online reputation management. Most planned to do this by assigning their current staff to spend more time on reputation or by acquiring new technology or



services. Only a few planned to hire new staff. Results were collected last year from 200 providers from a wide variety of specialties and practice sizes, according to PatientPop.





••• the business of research

European consumers want to control their data

 $R^{
m esearch}$ platform Vision Critical surveyed over 1,500 people in the U.K., France and Germany over the age of 18 who completed an online purchase within the last 12 months and found worries about data-sharing and privacy preferences.

Four out of five consumers (81 percent) believe more should be done by governments or brands to ensure the protection of their personal information. However, the vast majority of respondents (87 percent) said they would be more comfortable sharing data if they had more control over it - that is, if they could see the data being stored about them or they could easily change or delete it.

The findings suggest that when brands offer a heightened level of transparency and control around consumers' personal data, those consumers are more likely to share information that can be used to deliver improved brand experiences, ultimately leading to an increase in affinity and loyalty.



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Book offers great ideas for pitching yours

t first blush, a book Aabout pitching ideas may not seem germane to marketing researchers. After all, researchers are not ad or design agency workers trying to land new accounts with brilliant summations of their companies' capabilities. But when it's time to present the findings from the latest round of product research, for example,

they are similarly aiming to persuade or convince a potentially skeptical audience of the validity of their ideas, whether it's a too-busy-for-this C-suiter or a product manager who's sure your data is about to kill their pet project.

At just over 150 pages, Pitching Ideas (Bis Publishers; \$20) by Jeroen van Geel is a fast yet comprehensive read that offers a host of practical things to keep in mind as you craft strategies for your presentations, no matter what kind they are.

Van Geel is co-founder of Oak & Morrow, a Netherlands-based strategic design studio, and he writes with humor and a welcoming style that instructs and commiserates with the reader at the same time.

The six chapters are organized



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around the process of defining, developing and delivering the pitch. Early on he talks about the importance of language in presenting and framing situations as opportunities rather than problems, such as these two ways of communicating the same idea: "We're not getting enough kids aged between 10 and 12 into our museum" versus "Kids aged

10 to 12 love learning new stuff in a playful way and our museum is filled with exciting material. Let's do more to get them in!"

Those kinds of semantic gymnastics can get a little precious and if you get too vague or touchy-feely you may lose the room right off the bat but that's where knowing your audience is so important. Maybe that exec you're speaking in front of is all about the positive spin and he or she will respond well to a rah-rah approach. Or maybe they're all business and need you to get to the point, dammit, so they can get on with their day.

He acknowledges this in his chapter on understanding your stakeholders, diving into a little Jungian theory to look at some psychology types (sensation versus intuition, thinking versus feeling, extraversion versus introversion, etc.) and how they affect your audience's response to your ideas.

Also helpful is his take on the stakeholder map, with which you can chart the stakeholders involved and determine



Joe Rydholm can be reached at joe@quirks.com

if their influence will tip the balance toward a negative or a positive outcome for you. Are they decision makers, influencers or just interested parties? And will they be opposing, neutral or supporting what you are presenting?

In addition, he gives snapshots of the various audience members (CEOs, project managers, engineers), looking at what he calls their "natural behavior" and their vocabulary to offer guidance on how to (and how not to!) communicate with them.

Elsewhere, practical tips like how to dress, how to structure your presentation (end with a call to action!), where to position yourself in relation to your audience and what to do when you get a difficult question in the middle of your pitch help ground his advice in the real world.

He also offers what he calls a Core Idea Sheet, which is a quick way to encapsulate a goal by breaking it down into its main idea, three unique aspects that make it stand out and then what's needed to make it happen. Simple stuff, to be sure, but as the book so deftly communicates, sometimes the simplest ways are the most effective, especially when it comes to pitching ideas. 0

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With so many different nonconscious techniques out there, is there a single overall System 1 measure available?

Market researchers are using increasingly sophisticated methods to pull apart elements of System 1 non-conscious activity. While these can be very useful, when the objective is to screen lots of (often similar) messages or ideas, capturing multiple non-conscious influencers is costly, not sensitive or discriminating enough and at times could yield conflicting indicators. It's more practical - and proven predictive – to measure overall "gut reaction" with a carefully designed, cognitively advanced technique that captures human impulses in the most natural way possible (like with new Spark MCR™).

How do we decide which social and political issues our brand should focus on?

It is a common assumption in the era of Me Too and MAGA that consumers want brands to take decisive stances on political and social issues. Many experts have predicted brands that sit out of the debate will ultimately hurt their bottom line.

It's not difficult to see how companies are arriving at that conclusion. A Morning Consult survey in January 2018 found that 50 percent of Americans believe a company's social or political positions are important when considering a purchase. Fewer than one in seven say it is "not at all important."

But those figures are misleading because they assume everyone favors the same position. In reality, when accounting for party affiliation, 17 percent of Americans (Democrats) want strong advocacy from brands while 14 percent (Republicans) want those same brands to act in the opposite direction. It's hardly a slam dunk for companies to identify with political issues, especially considering the same Morning Consult survey found that 61 percent say corporate political stances have not changed their purchase behavior.

That is not to say that all brands and companies should shy away from taking a stance on issues that matter to their mission, values and core customers. But rushing to make a public declaration of support or opposition can cause brands significant pain if they haven't done the research



Erin Norman
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571-926-8852 x321



to know how their customers view things.

At Heart+Mind Strategies, we help brands discover the best way to engage in public policy debates. The right course of action is heavily dependent on the brand, category, customer base and their outlook. Companies don't assume they know what products or services consumers want without testing and the same theory should be applied to broader corporate values.

IN FOCUS

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



// Survey Monitor



••• technology research

IT workers opine on the future of disruption

Who's next?

A report, Digital Disruption: Disrupt or Be Disrupted, based on interviews with more than 300 digital transformation decision makers in the U.S. and the U.K., reveals what industries are most and least likely to be disrupted in 2018. Based on a survey of IT stakeholders from content management firm Alfresco Software, San Mateo, Calif., and Dimensional Research, the report identifies the qualities of companies most likely to be disruptors and concludes that the cloud is key to



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digital transformation.

When it comes to their own companies, 50 percent of IT stakeholders think they are leaders and will disrupt, while 50 percent feel they are behind and will be disrupted by the competition in 2018. By industry, more telcos (65 percent) and technology (65 percent) companies predict they will be disruptors, while 17 percent of IT stakeholders working for government and non-profit organizations worry they will be disrupted.

One takeaway from this survey is what is most likely to propel a company into the disruptor position. According to IT stakeholders, the top predictors of success are IT vision and ability to implement new technologies: vision of their technology leadership (62 percent); ability of their technology teams to execute (58 percent); and capabilities of new technologies, such as cloud, AI and IoT (57 percent).

On the other hand, companies most likely to be disrupted are those that are lacking the vision and right levels of investment to succeed, specifically: lack of budget and people resource investments (61 percent); lack of vision among business leaders (48 percent); no willingness for company culture to embrace digital transformation (47 percent).

Furthermore, 70 percent of IT stakeholders believe business executives are taking too long to make the digital transformation leap; only 38 percent feel the technology team is holding them back. Another 78 percent feel that people changes are the most difficult, while 22 percent feel the technology changes are the most difficult.

The report also looked at which industries were most and least likely to be impacted by digital transformation this year. Forty percent of IT stakeholders say banking is most likely to be negatively impacted by failing to digitally transform in 2018 and a third (30 percent) say retail is the industry most likely to be improved by embracing digital transformation.

Other industries most likely to be negatively impacted by failing to digitally transform include government (18 percent) and insurance (10 percent) while industries likely to be improved by embracing digital transformation include health care (24 percent), manufacturing (18 percent), airlines (17 percent) and transportation (17 percent).

Infrastructure clouds or infrastructure-as-a-service (IaaS) solutions can help companies innovate and

Survey Monitor // IN FOCUS

respond to changing business conditions. The vast majority (95 percent) of stakeholders say IaaS is important to their digital transformation and 81 percent say they have achieved value from IaaS but only 11 percent say they are doing everything they can and have maximized its value.

An online survey was sent to an independent database of IT professionals with responsibility for digital transformation. A total of 307 qualified IT professionals completed the survey. All participants lived in the U.S. or U.K. and worked at companies with more than 500 employees. Each had responsibility for digital transformation decision making. Participants included a mix of job levels, company sizes and industries.



retail researchShrink shrinks again

Shoplifting remains the top source of losses

Thefts, fraud and losses from other retail "shrink" decreased to \$46.8

billion in 2017 from \$48.9 billion the year before as shoplifting and organized retail crime continued to be the leading causes, according to the annual National Retail Security Survey released by the National Retail Federation and the University of Florida.

"Retailers are making progress in combating criminal activity but there are still many challenges," NRF Vice President of Loss Prevention Bob Moraca says. "Whether the threat is coming from cybersecurity, organized retail crime or employee theft, the job for retail security teams continues to become more difficult every day, especially when resources and staff are limited."

According to the report, shrink averaged 1.33 percent of sales, down from 1.44 percent the year before. A total of

• • • b2b research

Small businesses bullish on AI

Many already using automation

A research study of small business owners and managers and their views of artificial intelligence (AI) and automation technology by Intuit, Mountain View, Calif., found that small businesses are bullish on the technology and are already leveraging automation tech to manage and grow their businesses.

The study, Small Business in the Age of AI, conducted with Emergent Research, surveyed 550 small business owners and managers and found that small businesses view automation technology positively, with 54 percent saying they view automation technology primarily as an opportunity. While fear of technological innovation is often referenced as the underlying barrier for adoption of machine learning and AI, only 5 percent of respondents said they see automation primarily as a threat. In fact, very few small busi-



nesses think that automation technology will lead to job losses, with almost a third (31 percent) saying automation will allow them to grow their employee base, 59 percent saying there will be no difference and just 1 percent saying there will be significant job losses.

The study also found that of those surveyed, 66 percent were already using automation technologies to help them with a variety of functions, including: finance and billing (29 percent); marketing (28 percent); sales (27 percent); customer service (25 percent); operations (15 percent) and production (9 percent).

The study found that small business owners see benefits of automation technology, namely freeing up time to get more work done (79 percent), helping with customer service (77 percent) and boosting innovation (74 percent). These improvements are being driven by leading-edge automation tech, including big data analytics (24 percent), natural language processing (17 percent), machine learning (12 percent) and AI (11 percent).

In the future, small businesses expect automation to have continued benefits. Over the next five years, respondents said that the top five reasons automation will have a positive impact include business efficiency (73 percent), productivity (68 percent), innovation (62 percent), responsiveness to market changes (60 percent) and revenue (59 percent).

IN FOCUS // Survey Monitor

59 percent of retailers surveyed said shrink was flat or decreasing, up from 51 percent. Only 41 percent said shrink was growing, down from 49 percent. Shoplifting and organized retail crime (ORC) were the most frequent causes, accounting for 36 percent of losses, followed by internal employee theft (33 percent), administrative paperwork errors (19 percent) and vendor fraud or mistake (6 percent).

The most substantial losses per incident came from retail robberies, at an average \$4,237.02 each (down from \$5,309.72 the year before), followed by employee theft at \$1,203.16 (down from \$1,922.80) and shoplifting/ORC at \$559 (down from \$798.48).

For the first time in the survey, retailers were asked about their role in combating cybercrime. Two-thirds of loss-prevention executives said they meet at least quarterly with IT/cybersecurity counterparts to discuss potential threats and 86 percent said their companies have a cybersecurity incident response plan in place.

"Cybersecurity concerns are top-ofmind for retailers today as criminals continue to become more sophisticated in this area," says Richard Hollinger, a University of Florida criminology professor and the lead author of the report. "This is a growing threat that will require more resources going forward. Retail executives need to invest more in loss prevention to reduce these losses to their bottom line."

The survey of 63 loss-prevention and asset-protection professionals from a variety of retail sectors was conducted March 14 to April 13. The study is a partnership between Hollinger and NRF and sponsored by The Retail Equation.



food researchConvenient,healthy and fresh

Nielsen charts meal-kit growth in Australia

eal kits, which contain pre-por-Mean kito, which is and recipe instructions for a complete meal that shoppers prepare and cook themselves, are a small category with big potential in Australia, according to a Nielsen report on meal-kit consumption. As reported by Nielsen's Aline de Sena, associate director, retail industry group, during the past eight months, the number of Australian households who have made a HelloFresh and Marley Spoon purchase was 1.5 percent of total households (around 150,000 households). However, if the Australian market follows the trend of the U.S., this could represent 1 million Australian homes buying meal kits in the next 12 months - significantly impacting the traditional and online grocery retail market.

Understanding who this mealkit shopper is and their reasons for choosing this emerging consumption model is key to unlocking future opportunities for both retailers and brands. So who are HelloFresh and Marley Spoon shoppers? They tend to be affluent, with nearly eight-in-10 (77 percent) having a higher affluence than other Australian shoppers. They are also more likely to be younger shoppers (primary household shopper aged less than 45 years old). Second, when looking at life stage, they are more likely to be families and young transitionals. More than six-in-10 (64 percent) of HelloFresh and Marley Spoon primary shoppers are less than 45 years old.

What makes HelloFresh and Marley Spoon shoppers so unique? Their customers are very loyal and are willing to spend for the convenience and healthy delivery of their groceries to their front door.

Meal-kit shoppers are also highspend shoppers. Over the past eight months, HelloFresh and Marley Spoon customers spent on average \$78 (AU\$) per purchase, which is \$28 more than the average supermarket total spend. For retailers, meal kits could be used as a potential to increase basket sizes, as shoppers are demonstrating a willingness to pay more for convenience. For example, in Australia Woolworths recently launched the Ready-to-Create-Bag, a new initiative offering a convenient solution to customers who want to cook from scratch without the hassle of shopping for all the ingredients. And recently, supermarket chain Coles launched a convenient fresh offering, "combo boxes," which contain a mixture of fruits and vegetables, eliminating the need for shoppers to choose healthy ingredients.

HelloFresh and Marley Spoon customers shop less frequently in bricks-and-mortar supermarkets than the average shopper (-11 percent). If meal kits continue to grow and start to hit supermarket shopping occasions, it has the potential to impact one of the most important retailer success metrics: in-store traffic. Manufacturers should consider partnering with retailers in order to ride the wave of online meal-kit consumer adoption, as they have a large online grocery customer base and are constantly innovating their offering.

HelloFresh and Marley Spoon are

attracting heavy shoppers of fresh produce. With a strategy focused on delicious, healthy meals planned for the customer, their offering resonates with this segment. Considering fresh produce is around 40 percent of total grocery spend, manufacturers and retailers should also consider the role of fresh as part of their offering.

"There are clear benefits of scale as the business develops. HelloFresh's expanding customer base allows us to further invest in our supply chain and technology platform and strike more beneficial arrangements with suppliers," says Tom Rutledge, CEO and Founder of HelloFresh, Australia. "For example, HelloFresh negotiates directly with local, fresh producers to reduce the time from ground to table. Such investment together with customer feedback and insights allows continuous process and product improvement. And as we grow we see the compounding effect of more customers making more referrals, which means faster growth, more insight lead optimization and greater marketing efficiencies."

More than 65 percent of Hello-Fresh and Marley Spoon buyers have made a repeat purchase. These two companies have a lot of loyalty and customer satisfaction, when compared to the benchmark for other grocery product launches, where a 40+ percent repeat purchase rate is considered healthy.

Meal kits tick a lot of boxes for Australian shoppers, as they resonate through their convenience of delivery to the front door, healthy eating through fresh ingredients, reduction of food waste and portion control and thus they are a powerful source of growth for retailers and manufacturers. Tapping into this growing movement will help businesses be on the winning side in the evolving online grocery landscape.



shopper insightsSearch-termsindicate ashopper's proximityto purchase

Abstract vs. concrete words

Marketing agency Performics and Northwestern University, in partnership with the Bing Search Network, have released a new study showing how search-query language indicates where a person is in their shopping journey. The study also confirmed that aligning search results with the searcher's distance to purchase can increase engagement.

The study was conducted by the Intent Lab, a research partnership between Performics and Northwestern University Medill School of Journalism, Media and Integrated Marketing Communications. The Intent Lab collaborated with Microsoft to leverage searcher intent from the scale of the Bing Search network. The study comprised a comprehensive search query review, lab experiments and an ad intervention study on actual clickthrough rate (CTR) data.

"Our study found that a person's search query can indicate their psychological distance to an action or goal, like buying a product or service," says Ashlee Humphreys, associate professor at Northwestern Medill. "We found that search queries that contain fewer concrete words and more abstract words, like 'why,' indicate an abstract mind-set, which tends to occur early in the purchase journey. Concrete queries, like 'shop,' indicate a shorter distance to action. Study participants with a buying goal used search queries that were 15 percent more concrete [less abstract] than participants with a browsing goal."

The study also found a match between searcher intent and likelihood to click on an ad. Participants with browsing goals were 20 percent more likely to click on search results that emphasized the word "best" (abstract word). Participants with buying goals were 180 percent more likely to click on search results that emphasize the word "shop" (concrete word). Participants with concrete words in their search query were also 135 percent more likely to click on retailer search results (vs. nonretailer results, where they're not able to buy immediately).

As part of the study, Performics ran three live ad campaigns in the beauty products category, bidding on keywords with various levels of concreteness: "how" (most abstract), "best" (abstract) and "buy" (concrete). The study found a 17 percent increase in likelihood to click when matching concrete/abstract search keywords with the ad.

As a result of the study, Performics developed an Intent Scoring Algorithm that codes every search keyword in the advertiser's account based on the level of concreteness/abstractness and then uses this measure to identify the consumer's place in their buying journey. The alignment of keywords to intent mind-sets allowed for more tailored ad copy, bids and landing page experiences that drove conversions and increased efficiency.



Product and Service Update

• • • survey research Survox updates platform

Improves international study support, Web themes

an Francisco-based survey technol-Ogy company Survox has released a new version of its Survox Platform with over 100 enhancements and bug fixes. New features include advancements to cross-study quota controls, improved international study support, more flexible Web themes, improvements throughout the jQuery and JavaScript libraries, improved respondent voice file management and new sample workflow options. There are three major aspects to Survox Platform: Insights Research, Insights Hosted Managed Service and Insights Agents. The Insights Research platform allows users to field phone, Web and IVR studies in a multimode design with sample management. It is supported by private cloud hosting, dialer capabilities and professional services options. Insights Hosted Managed Service provides a managed private cloud implementation. System, software and project-specific services provide users a solution with the goal of being an integrated extension of any team. Insights Agents integrates the scripting and survey capabilities into the



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Enghouse call-center solution. This enables simple to complex agent scripting workflows with performance- and quality-tracking metrics. This integration also enables users to implement post-interaction surveys.

www.survoxinc.com

••• eye-tracking **Eye-tracking in 3-D**

Tobii Pro VR Analytics

 $oldsymbol{C}$ weden-based eye-tracking company Tobii Pro has launched Tobii Pro VR Analytics, a tool that allows eye-tracking studies to be conducted within 3-D virtual reality environments. It integrates into Unity environments and comes with automated features for visualizing and measuring what a user sees, their interactions and navigations within a simulated world. This is designed to help brands, retailers and designers analyze key influencers of behavior and decision-making throughout the consumer journey and allow for more efficient, engaging and safer training, particularly for those in high-risk occupations like industrial, medical and emergency response. www.tobiipro.com

••• research education Learn MR fast with **Principles Express**

More courses to be rolled out

Market Research Institute International, in partnership with the University of Georgia Center for Continuing Education and Hotel, are now offering Principles Express, a new suite of on-demand courses designed for market researchers who need to get up to speed quickly on a key research subject. Communicating Research Results and Quantitative

Data Collection Methods are the first two online course releases and each can be completed in a matter of days. Over a half-dozen Principles Express courses will be rolled out throughout 2018 on the Georgia Center's learning portal. Quantitative Data Collection Methods teaches students how to choose the most appropriate data collection method given the audience, the topic area of research and the planned methodology; 13 data collection methods are covered in the self-paced, self-study course. Communicating Research Results teaches students how to turn research findings into actionable recommendations. Students will learn how to connect findings, insights, conclusions and recommendations in a logical and seamless way so that their work has maximum impact.

www.georgiacenter.uga.edu/courses/ market-research

••• brand research Kantar, Alibaba partner on platform

MR plus consumer behavior insights

 $R^{
m esearch\ company\ Kantar\ and\ e-}_{
m commerce\ company\ Alibaba\ Group}$ have formed a partnership and are co-creating an integrated "insight to activation" platform. Kantar mapped and validated Alibaba's marketing KPI Consumer Asset framework to Kantar's portfolio of marketing KPIs. With the validation of the framework, the companies are integrating Kantar's research intellectual property and marketing insights solutions with Alibaba's consumer behavior and brand insights derived from active mobile consumers across China. The first outcome from the partnership is a set of Kantar-branded solutions: Brand Measurement & Diagnosis;

Brand Activation Guidance & Planning; and Performance Measurement & Optimization. The availability of the solutions through Kantar China is currently slated for Q3 2018.

www.kantar.com www.alibabagroup.com

••• CX research

Crimson Hexagon adds AI to process customer input

Draws from social media, chat logs

 $B_{\rm firm\ Crimson\ Hexagon\ has}^{\rm oston\text{-}based\ consumer\ insights}$ released BrightView for Customer Care, a solution that uses artificial intelligence to detect and classify customer inquiries from public online and direct communication channels. An extension of the foundational algorithm of the Crimson Hexagon Platform, BrightView for Customer Care identifies and processes customer communications from any source social media, e-mails, chat logs, call transcripts - so they can be routed to the proper system, reducing time to issue discovery and resolution. Added capabilities include a personalized insights feed that surfaces insights and anomalies of a conversation that are relevant to the user's specific areas of interest and that would otherwise be hard to discover and predictive alerts that proactively send notifications early in the trend cycle to alert users of shifts or emerging crises.

www.crimsonhexagon.com

••• Briefly

■ U.K.-based software firm Digital Taxonomy has launched Codeit Professional, a software tool designed to increase the quality and speed of coding unstructured text and other data, including market research

survey verbatims, customer reviews, social media comments and text from voice of the customer programs. Building on the original Codeit tool, Codeit Professional uses a blend of artificial intelligence, machine learning and text analytics technologies to help users uncover insights from unstructured material. www.digitaltaxonomy.co.uk

■ London-based E-Tabs has launched a new infographic plugin, E-Tabs Vizualz, which is designed to speed and simplify the creation of data-driven infographics in PowerPoint.

www.e-tabs.com

- Infotools has released a new publication called The Insider's Guide: Five Ways to Keep Consumer Insights at the Heart of Your Organization, which includes a compilation of viewpoints from Infotools' leadership, sharing best practices on topics such as data democratization and proving the ROI of market research. It can be downloaded at goo.gl/CBo69n.
- MarketResearch.com has released a new white paper titled The Importance of Market Research for Validation and Decision Making, which draws on in-depth phone interviews with a variety of Fortune 500 companies. It can be downloaded at bit. ly/2kHxunw (registration required).
- Chantilly, Va., company BIA Advisory Services has integrated Reston, Va., firm comScore's local television audience measurement and ratings information into BIA ADVantage, its proprietary platform that delivers local market advertising intelligence. Leveraging comScore's local television information will provide audience details for every station in 210 local television markets.

www.biakelsey.com

■ InsightsNow, a Chicago-based behavioral research firm, has released a second wave of research on the freefrom movement – a consumer-driven

demand for eliminating allergens and other ingredients from food and non-food products. The Clean Label Research Community Behavior Report compiles data collected from the company's proprietary research community of Clean Label Enthusiasts (CLE) and uses a new CLE scoring system. The subscription-based report is released quarterly, with the inaugural report released earlier this year.

www.insightsnow.com

■ Palo Alto, Calif., digital marketing analytics company conDati has introduced the first commercial release of conDati Marketing Analytics, a cloud-based service that blends siloed data from multiple martech systems to deliver a single data asset that is processed, analyzed, modeled and projected to produce visibility into digital campaign performance.

www.condati.com

Consumer insights firm Toluna, Wilton, Conn., has completed a corporate rebrand and has launched TolunaInsights, an automated consumer insights platform with solutions that include: Audiences, providing access to members of Toluna's community of influencers; Surveys, allowing users to create surveys through an engine or the PowerSuite of automated methodologies; Communities, allowing users to recruit, build and manage communities in real-time; and Analytics, a Web-based data visualization and analytics tool. Toluna offers three service levels to complement the platform, which differ by how much the company's experts are involved and the process and complexity of the surveys and services.

www.toluna-group.com

■ Online qual research platform Aha! has released Dynamic Canvas as part of its suite of market research tools. Dynamic Canvas is a multifaceted projective tool that allows insight strategists and researchers to create customized visual exercises for consumer and B2B research studies.

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These exercises include perceptual and brand mapping, concept testing, buyer journey decision/path-to-purchase, as well as free-form strategic image and text-related exercises.

ahaonlineresearch.com

- MFour Mobile Research, Irvine. Calif., is offering free access to its Path-2-Purchase platform through a limited trial on the company's newly redesigned Web site (registration required). Consumer insights professionals can access validated firstparty data that shows U.S. consumers' journeys across the company's database of 12.5 million U.S. locations, including the top 1,000 retailers. mfour.com
- GfK MRI, New York, and marketing company Acxiom have joined forces to develop MRI Predictive Audiences Powered by Acxiom, a solution for omnichannel marketing planning and execution. As part of the partnership, the two companies will build custom and syndicated segments, resulting in audiences available through Acxiom's Audience Cloud and the LiveRamp Data Store.

mri.gfk.com www.acxiom.com

■ Germany-based agricultural research company Kleffmann Group will release an updated version of amis AgriGlobe, its software tool from its Ag market insight division. The update offers software improvements, including a strengthened security system in line with GDPR. Clients can select new country additions for some Asian, Latin American and European countries and the new version also includes more transparency within the fruit and vegetable sector.

www.kleffmann.com

■ Encino, Calif., sampling company InnovateMR has released the Pegasus Self-Service Sampling Platform, a multi-user solution that allows

research professionals to manage sampling projects and control multiple survey respondent supply sources directly within the Pegasus Job Management tools. The company has released a sample feasibility tool embedded directly into the Google Chrome browser available in the Chrome Webstore. This version gives Pegasus users survey respondent pricing, feasibility size and an estimated range of days required in-field.

www.innovatemr.com

■ Sydney-based research company BuddeComm has launched its Telecoms Maturity Index, which measures and ranks the maturity of a country's telecoms industry on a scale of 1 to 100. All countries are placed into one of three categories, Market Leaders, Market Challengers or Developing Nations, according to their market index score. The index is used to fuel regional analysis and provides a country versus region comparison. It is now available in all Asian, African and Middle Eastern reports and will soon be available in European and Latin American reports.

www.budde.com.au

■ Alpharetta, Ga., sample provider P2Sample has launched its new do-ityourself tool P2Solo. The solution gives users full access to P2Sample's technology platform and allows users to enter their project specifications, manage budgets by setting their desired CPIs and find feasibility or run complete projects on their own.

www.p2sample.com

■ San Francisco-based research automation platform AYTM (Ask Your Target Market) has launched Survey Editor 3.0. The new version includes an upgraded platform with new collaboration features, drag-and-drop functionality for image/video upload and question duplication as well as a new version of AYTM Logic. aytm.com

■ Mobile research software firm One-Point Global, London, has announced plans to enable augmented reality (AR) question types within its survey app. The development will allow researchers to use the AR capabilities of Apple's iOS 11 and 12 mobile operating systems available later this year.

www.onepointglobal.com

■ Emotion measurement AI company Canvs, New York, has launched Canvs Surveys, an emotion measurement AI that analyzes open-ended responses at media companies, brands and across industries.

www.canvs.ai

■ New York-based research firm the Luxury Institute has launched Emotional Intelligence Xpert (EIX), which allows enterprises and employees to develop expertise in their chosen profession and gain emotional intelligence skills to build client and peer relationships. EIX recently launched the Emotionally Intelligent Brand Index, developed using 10 years of quantitative and qualitative research with affluent consumers, frontline associates, managers and executives at top-tier brands. The data from the index can be used for discovering and discerning what constitutes an optimal customer experience across any channel of engagement.

luxuryinstitute.com

- Horsham, Pa., research solutions firm Marketing Systems Group has released Elevate, a new telephone number-screening process designed to improve the efficiency of landline phone files, whether client-provided lists or randomly generated samples. www.m-s-g.com
- Chicago-based researcher IRI has added new audience solutions for IRI Verified Audiences to improve how CPG manufacturers and retailers reach consumers. The six IRI

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Verified Audiences solutions include: Purchase-Cycle; Share-of-Wallet; Price-Sensitivity; In-Flight Conversion; Lifestyle; and Random-Weight. Five of the six solutions are now available to clients, with Random-Weight Verified Audiences becoming available this summer.

www.iriworldwide.com

■ New York research and data science company Renaissance Research & Consulting has developed a new segmentation system, DiffSeg, which can segment the sample of a max-diff study into groups with distinct patterns of preference for a set of items.

www.renaiss.com

■ Ft. Lauderdale, Fla., company WAC Research now offers intercept and targeted interviewing for large, small and remote markets across the U.S. as well as alternative videostreaming services. www.wacresearch.com

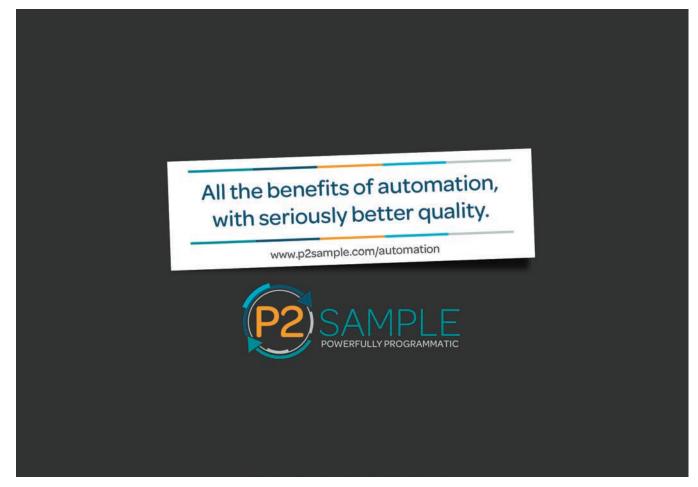
- Santa Clara, Calif., social analytics firm NetBase has introduced Standard Audiences, a tool that provides realtime insights for 18 demographic or affinity groups to help brands better understand their target customers.
- Omnichannel identity resolution firm LiveRamp has announced a data scoring initiative, with New Orleansbased data technology company Lucid as the first partner in the program. The initiative aims to advance ethical data use and increase the accessibility of audience validation for data buyers in the IdentityLink Data Store. The partnership allows LiveRamp customers to compare data from Lucid's marketplace, which

offers access to survey respondents, providing more information on the quality of data segments in LiveRamp's IdentityLink Data Store. liveramp.com

■ Nielsen Catalina Solutions, New York, has released a cross-screen solution for the CPG industry that measures in-store sales driven by TV and video advertising. The service provides a holistic and device-agnostic view of how TV and/or video advertising is performing.

www.ncsolutions.com

E-mail your press releases to news@quirks.com to be included in our Names of Note, Product and Service Update or Research Industry News sections so we can share the information with our audience of 60,000 subscribers!





Why you need to know about conjoint

| By Craig Lutz, Devon McBee and Ben Rogers



snapshot

Porsche, Dodge and the value of using conjoint analysis to listen to customers. n the early 2000s, two new car models had very divergent fortunes: One was highly successful and the other was a flop. In their May 2016 Harvard Business Review article, "In product development, let your customers define perfection," Madhavan Ramanujam and Georg Tacke shared the intriguing story of two automotive industry giants, from which we've pulled a valuable product research lesson shared below.

After avoiding bankruptcy in the early 1990s, Porsche executives set out to turn around the storied car brand. By the early 2000s, the burgeoning SUV market became a promising target. Porsche set out on a mission to understand the market and its customers' appetite for a luxury SUV.

Confirming that customers would welcome a Porsche SUV, the product team gathered feedback from consumers on every aspect, finding that they were willing to trade-off on a manual transmission (a staple in all Porsche cars up to that point) in favor of other iconic features that Porsche had become known for, including sportiness, power and handling.

The authors wrote that, "The customer-listening process continued with every proposed feature. If customers valued and were willing to pay for them, they were in. If not, no amount of convincing from Porsche engineers could overrule the end user." The Porsche Cayenne soon hit the market and was an instant success. And it later became the most profitable vehicle in the industry.

Around the same time Porsche was launching the Cayenne SUV, the CEO of Fiat Chrysler

declared, "Of all the cars I can get wrong, it ain't this one." The car he was referencing was the Dodge Dart, a vehicle for which the company shut down production several years after its launch, amassing a huge financial loss.

One key takeaway is that Porsche bucked conventional thinking using good product research: It showed that a legendary sports car manufacturer with a loyal fan base could succeed in the SUV market. Yet, what went wrong with Dodge building another sedan? Harvard Business Review shared this valuable lesson: "The underlying cause ... was that Fiat Chrysler did not try hard enough to find out what the American compact car customer wanted, valued and was willing to pay for, before turning the Dart over to engineers and designers to build it."

Product managers and market researchers are frequently faced with critical product development and trade-off decisions. Which features should we build into the product? What features should we include today? How much should we charge for the product? These and other product development questions are difficult to answer without data.

Yet many product managers and researchers don't utilize proven research methods for product development. In fact, in a recent study we ran with product managers and researchers, we found that few were aware of one of the most important product development analysis techniques: conjoint analysis. In our interviews with over 80 product managers and researchers, only about 25 percent were aware of conjoint analysis. And of those who were aware of conjoint, only 30 percent ran a project last year, yet had proven results.

www.quirks.com/articles/2018/20180815.aspx

To give researchers a competitive advantage while developing products and to help close the awareness gap on conjoint analysis, we want to discuss what conjoint is, how it works and what business questions it can answer.

Optimizes your chances for success

Conjoint analysis is a special class of research tool that provides the insights necessary to confidently determine what attributes and features of a product or service are important to your target consumer and what optimizes your chances for success in the market.

As different package configurations are shown to respondents, they simply select the option that they would be most likely to purchase. This is an exercise that all of us face every day and why the data acquired through conjoint analysis is so actionable. Conjoint analysis will accurately prioritize product development, predict price sensitivity and uncover competitive advantages. Conjoint analysis delivers accurate data because of how questions are structured and presented to respondents. Finally, conjoint analysis will model and predict the choice share that can be won when introducing specific product or service combinations within a current or new market.

Conjoint analysis is a market research technique for measuring the preference and importance that respondents (customers) place on the various attributes of a product or service. Conjoint can play a critical role in understanding the trade-offs that consumers are willing to make when given multiple product configurations.

Conjoint analysis is typically conducted via online questionnaires where respondents are shown different product bundles and are then instructed to evaluate and select those bundles based on which one they would be most likely to purchase. In analyzing conjoint studies, respondents' selections shed light on the features and feature combinations that show up more frequently in favorable bundles. The essence of conjoint analysis is predicting and modelling the results of the online question-

naire into what product configuration consumers are most likely to purchase – in other words, it models the real-life trade-off decisions people make every day when purchasing products.

Up to this point we've discussed what conjoint is and how it works but what business questions can you actually answer with conjoint? Conjoint is an excellent tool for product and pricing and it can also be used for employee benefits research, brand awareness and more. Below we share some of the key business research objectives that can be answered using conjoint:

- What feature or functionality of a product is most important and influential to the market? What do customers focus on when making purchase decisions? What has the greatest impact on whether they will purchase?
- What trade-offs can we expect our customer to make? What are they willing to give up in order to get what they want?
- What role does price play in decisionmaking and what is the optimal price point? How sensitive will customers be to shifts in pricing? What is the monetary value of the different product attributes?
- · How can we create a benefits package

- that our employees want and is still cost-effective for the business?
- What does optimal pricing and packaging look like for a software platform to address different types of buyers and maximize revenue?

Avoid costly mistakes

Conjoint analysis can help companies not only build products that customers want but also avoid costly product mistakes and the fallout when a product fails. Relying solely on instincts and internal teams is a recipe for disaster. By using product research and development techniques such as conjoint, you can speed up your insights to action and have confidence that the product you've built is the product your customers want. ①

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••• panel research

Filter out the problems

Best practices in working with panel samples

| By Martin Pacino



snapsh<u>ot</u>

Martin Pacino looks at panel sample, how it works, how it doesn't work and how to make it work.

As it has the very fabric of the human experience, the Internet age has profoundly changed the practice of market research. In just the last two decades, the advent of online data collection has ushered in a rate of evolution of the science not seen since the telephone became as household object. Beyond reshaping the market research industry, online research has spawned dozens of new ones – DIY tools, analytic packages, programming software, e-mail deliverability, etc. – and none more ubiquitous than that of panel sample providers.

For anyone unfamiliar with the panel industry, hundreds of companies have sprung up almost overnight and engaged the global populous to sign up to take online surveys and tens of millions of people have answered their call. What's more, since there is no reliable source for procuring or randomly generating e-mail addresses in bulk, it is among these people alone that online research is conducted.

With panel sample comes great opportunity but also great risk to data quality. Here is an examination of how panel companies function, how that function lends itself to potential trouble and exactly what you as a purveyor of market research data can do to protect it.

Gather constant information

In the process of enrolling and surveying their members, panel companies gather constant information about them. This information, called profiling data, is used to determine which respondents best fit a given survey. Procedurally, a full-service market research company enlists a panel provider to do a survey among a given population. The panel company uses its member-profiling data to assess how many surveys it can complete among the target population (feasibility) and at what cost per interview (CPI). Both sides shake hands. Someone programs the survey online, provides the panel company with the link to which it can direct its members and voila! We have a survey in-field, gathering data.

There are two primary ways in which a panel company can drive respondents (traffic) to a given survey.



www.quirks.com/articles/2018/20180806.aspx



Direct sampling: This is how most people envision panel companies working and for many, it is the primary way in which they do. This involves directly inviting its panelists via e-mail or through access to a portal with several surveys in need of respondents. These panelists are subject to an opt-in process and are generally considered to be the best-quality sample that a panel company can provide. They have been vetted and are subject to periodic validity checks.

River sampling: These respondents are recruited in real time from an ad or post on the Internet to take a survey. They are generally subject to some measure of identity verification, though less strident than an actual panelist. Thus, they are generally a less reliable respondent. In most cases, upon completion of a survey, they will be invited to join the panel for whom they have just completed the survey. This is one of the primary ways in which panel companies grow their membership.

What could be considered a third avenue for driving traffic are the ongoing and temporary partnerships that a panel company will form with another one to meet a given survey objective that they otherwise wouldn't be able to. These can include acquiring sample in a country where they have no resources or bolstering their completes to meet a target sample size, for example.

Inherent foundational problem

This process of a market research company engaging a panel provider to sample their survey sounds perfectly reasonable, however it carries an inherent foundational problem. In order to attract people to join their panel, and continue to take surveys, the panel companies have to provide them an incentive, usually a monetary one. That might not seem problematic but here is where things get precarious.

The profiling data that panel companies are collecting on their members isn't just used to match them with appropriate surveys, it is also used to determine how common they are within the general population (their "incidence"). The less common they are, the more they need to be compensated to take a survey. If

a survey requires 500 females 18+ years of age, the panel company will have many people who meet that criteria. It will only need a small percentage of its members who meet that profile to participate and still complete 500 surveys. They are a "high incidence" population, therefore the incentive required to complete the study is relatively low.

Let's assume that the CPI for that population is \$X. If that same study required 500 females 18+ years old who fly commercial aircraft for a living, their incidence is much, much lower and therefore the incentive needed is higher (in this case significantly) to maximize the percentage of people who will take it. Where a sample of 500 females 18+ is \$X per complete, the cost of females 18+ who fly commercial airplanes for a living could be \$30X, and that cost is passed along to the market research company commissioning the study.

Were the world populated by robots programmed to only tell the truth, this entire approach would work fine. Everyone would get accurate data at a price commensurate with whom they are trying to survey. However, panel members being actual human beings, and often aware of this relationship where low incidence = high incentive, the result is a sampling structure with a baked-in motivation for the respondent population to lie about who they are. What's more, this process also creates a motive for panel companies to not expose them. After all, the more people they can muster from low-incidence populations, the more they will be paid to sample a survey thereof.

Envision an average Joe who works as a bartender or realtor or any number of jobs held by millions of others, globally. Joe doesn't have a particularly unique hobby, he's not wealthy, he doesn't have any commercial decision-making authority and nothing really distinguishes him from the masses as a survey target. However, Joe knows he can get paid to take surveys online and he understands that the more unique he can appear, the more money he can make. When joining a panel, perhaps Joe eschews bartending and says he's a surgeon. Rather than report all of his traits accurately, he makes himself a low-incidence target on every possible dimension — an uncommon ethnicity, a luxury-car owner, the sole decision maker for medical supply procure-

ment and so on. Where real Joe would have commanded maybe \$1-\$2 per survey, fake Joe is now at an incidence within the population that could earn him upwards of \$200 for his opinions.

Let's assume Joe creates 20 profiles, all with different but similarly low-incidence traits. Joe then gets turned onto this technology called Internet bots and goes from being 20 people to 2,000. Suddenly the sample population for this panel is so full of Joes that the odds of its data reflecting actual market reality are very long. Add to that the number of different people who do the same thing Joe does and that data gets precipitously more suspect.

Joe is what is commonly known as a professional survey-taker. Indeed, that is now a job title in our lexicon and they are gumming up the works for many companies and all of the reasons they may employ survey data to make decisions, which can extend beyond just business needs. What if the organization sponsoring the survey is, for example, the Leukemia and Lymphoma Society and it needs to know how doctors are prescribing medications to best treat gravely ill children? Can we trust Joe to self-censor and his already broken moral compass to resist the money he can make by offering his completely unqualified opinion for such an endeavor?

In fairness to panel companies, many are dedicating untold resources to not only eradicate professional survey-takers and cheaters from their panels but also to ensure they are never able to join in the first place. Approaches like double opt-in enrollment and constant re-profiling/auditing of their panelists can be highly effective at cleaning up data. In fact, many panel companies have (wisely) made their approach to preserving data quality a central tenet of their brand promise and competitive position. There remains, however, the persistent problem that while Joe may be bad for data, he can be good for business and he is aided by evolving technology that makes him more evasive and sophisticated in his methods.

While this veritable arms race escalates between panel providers out there and those who would defraud them. many market research companies and their clients are left powerless to hope the partner they've selected to collect their data does everything they can to ensure it's clean and accurate.

Well, powerless no longer.

Simple and effective steps

Here are some simple and effective steps that any market research professional can take to ensure the panel data they are using is as accurate as it possibly can be.

Trap questions. While you might not have much control over who takes your online survey, you have complete control over the questions they are asked. A trap question is just what it sounds like - one that is designed to catch a cheater.

Remember when Joe employed a bot to augment his ability to cheat? Bots can be a serious problem in the sample world. While the term may conjure an image of a scowling, 36-armed robot pounding at dozens of keyboards, they are actually just software programmed to be able to take surveys, many surveys, and quickly.

Bots rely on a principle that has become a treasured axiom of us researchers: "We are only seeking your opinions. There are no wrong answers to these questions." Although that encourages honesty, it also allows a non-sentient respondent to answer survey questions in any fashion and not break any rules. If there is no objective truth then any response to a given question is acceptable.

So, the first principle for a trap question is that it actually have a wrong answer. Here is an example of a common trap question.

Which of the following is a color?

- 2. Ball
- 3. Red
- 4. Movie
- 5. Bottle
- 6. None of these

That may seem simple enough to answer correctly but try doing it without a functioning brain. The typical bot will not know the correct response and will have a one-in-six chance of getting it right. Program your survey to terminate anyone who gets this wrong and you will catch most/all bots.

This question will also inform on the quality of the panel company with whom you are partnering. No real respondents should be terminated at this question. If you find that upwards of 20-30 percent of people who start the survey are being terminated here, you need to have a word with your sample partner.

While some cheaters play the numbers game and unleash bots on every survey they can, others actually take surveys themselves when the incentive is high

enough. For them, trap questions are going to need a bit more sophistication. Anyone can identify a color, however there is always content that your target sample population will find elementary but will elude a cheater.

For example, IT decision makers (ITD-Ms) are a high-demand survey population. As technology evolves in the workplace, those who sell it are constantly surveying their market. Many professional surveytakers know that ITDMs are highly incentivized respondents and also get a steady flow of survey invitations.

In a survey of ITDMs, here is a good trap question:

What does SaaS stand for?

- 1. Service as a Sale
- 2. Software as a Service
- 3. Solutions as a Service
- 4. Service and all Software

There is not an ITDM on Earth who doesn't know that the correct answer to that question is #2 but the same can't be said for all cheaters. And while that question alone might not catch all cheaters, adding more of these types of trap questions that are obvious only to those qualified to take your survey will weed out just about all of those who are not.

IP lock security. One of the tools cheaters employ, either via bots or by their own hand, is to make themselves appear to be more than one person on a panel. This allows them to take the same survey multiple times and repeatedly collect its incentive. However, many do not bother using more than one computer to take surveys. Your IP address is tied directly to your ISP connection and is a unique identifier for the connection itself and not the user. Virtually every survey programming software tool comes with a security function that will lock out an IP address after it has taken the survey once. Make sure you understand that and are using it. If you are not programming your own survey, make sure whoever is programming is using it.

Test your survey repeatedly from the same IP address to see if you are allowed into it more than once. Have multiple parties ask to be able to test the survey from different locations but then use the provided test path from one machine repeatedly. If you are allowed into the survey from the same IP address, make sure that its host has IP-level security. If your programmer does not have IP-level

security, strongly consider working with one who does. Even honest respondents can be members of multiple panels and if two of them form a partnership on your project, the same respondent could be unwittingly invited to take it by each. IP security will prevent them from being able to complete it.

Join your partners' panels. There is perhaps no better way to gain visibility into the practices of a given panel company than to join it yourself. You will be exposed to countless insights about which you would otherwise have had to take them at their word. This will include, but by no means be limited to, the process by which you were recruited to join, the procedures for verifying the authenticity of your information and who you claim to be, the frequency with which you are asked to take surveys, the frequency and manner in which your identity is confirmed, the incentive being paid relative to what you are paying, etc. The insights to be gleaned from being a member of your providers' panels are many.

The most discovery-rich approach one can take to join their partner's panel is to do so in a way that does not alert them to your presence as a member. That can achieved by Googling different ways to join panel companies and frequenting parts of the Internet where recruitment is common. If all else fails, you can and should just ask them to invite you. You likely won't get to see as fully behind the curtain but at least they will know you're looking.

Control speeding and straightlining. Remember, professional survey-takers have no interest in even trying to provide you accurate data. They maximize their profits by taking a survey as quickly as possible and moving onto the next one. The same is true for bots they might employ. A cheater will almost never take the time to actually read the content of the survey questions or their response choices.

So, one way to easily spot cheaters is by noticing the outliers who complete the survey impossibly quickly. If you test your survey as a real respondent and it takes about 11 minutes to complete, anyone who completes it under five minutes has probably not read a word of it. Take the time to establish where the line is between a fast reader and someone who is exceeding human capability. If anyone crosses that line, their data is worthless.

Almost all online surveys contain matrix or grid questions. This is a design that asks for your opinions to many different items on the same page and all in response to one overall question.

Across the top of that page will be your scale of agreement, then the items you want rated will run down it. For example:

Please rate how much you agree or disagree with each of the following statements on a 1 to 5 scale.

Item 1

Ttem 3

Item 4

The professional survey-taker will want to get through these grids as quickly as possible and therefore will often just give the same response to each one, all the way down the page. This is called straightlining. Alternately, they may mix up their responses at random with no regard to reading the item text.

There are two primary ways to combat this.

If you find each matrix question in your survey has the same response to all items, that is a straightliner and their data is no good.

In order to catch the more clever cheater who knows better than to straightline, simply make one of your vertical items a direct command, such as: "Please select the number 2 for this item."

Anyone just clicking through and not reading the survey will have a one-in-five shot at getting that right. Put another way, no one ever made it in baseball with a .200 batting average.

Watch the river. As we previously covered, one of the ways in which panel companies are sampling your project is to reach completely outside their dedicated panelists and use river traffic directly from the Internet. While a small percentage of river sample is generally fine, an excessive amount can cause problems.

Most panel companies will be transparent as to how much river sample they are using or plan to use. That's step one in controlling for too much river sample: Ask your partner. Generally speaking, 10 percent of your total sample is a good target limit for consumer traffic from river sources. However, for a higher-level B2B study, o percent is an appropriate target due to the lack of vetting and Internet sourcing.

There are many panel companies out there who only provide river traffic and have no actual panelists. They provide cheap, fast sample and this can make them an attractive partner to any panel company looking to maximize profits,

which can create significant problems.

For example, a drawback of river sample (apart from data quality) is that it cannot be recontacted. If you finish your study and realize you forgot to ask everyone a critical question, any river sample you have used is off into the ether. This creates an opportunity if you are suspicious that there is more river traffic on your study than was agreed upon. Tell your panel provider you may need to do a recontact and ask their expected completion rate. If they say 60 percent+ they are likely being honest. If they say 20-30 percent, or worse yet o percent, your sample is likely to be mostly from the river.

It can be hard to identify river sample from actual panelists but one way to do so is to insist on different survey links for river and for panelists and, on the panel link, include a question that says, "Who invited you to take this survey?" Your panel provider should be able to tell you exactly what the answer to that question should be. They, after all, should have invited everyone on that link. If you get answers to that question that are all over the place, or say things like "ESPN.com," you will know something isn't right.

Not going back in the bottle

The market research world was a simpler place before people were paid to be quantitative respondents but that genie is not going back in the bottle, nor should we want it to. Just like any industry, there is a wide range of quality among panel companies and your first step to ensuring client success is to identify the ones you know to do a good job managing data quality and engage them as much as possible.

However, even the best ones can be subject to a particularly clever or wellequipped cheater. Only through having a full understanding of how the panel industry works, the risks inherent to its structure of sampling and the steps that you can take to actively mitigate them can you ensure that your clients are using the highest-quality data possible to make decisions. Your panel partners and clients can and will have differing objectives when it comes to gathering data and it is incumbent upon us as researchers to hold those of our clients paramount. 0

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snapshot

Stephanie Marsh offers
tips and guidance
on when and how to
employ user research
during a product's life
cycle.

••• new product research

Working toward a common goal

Combining user research techniques for new product design

| By Stephanie Marsh

We all have a good idea of the difference between user research and market research but it's worth making sure we have a shared understanding. User research is the study of people's (users') behavior, motivations and needs in a particular context, which affect how people understand and use things in their daily lives. Market research gathers and analyzes information about consumer preferences, wants and needs to identify potential markets for a product or service.

There is both overlap and divergence between the two fields in terms of techniques, objectives and outcomes. In this article, I will focus on how user research techniques can be employed to gain insight, to help shape product development to meet users' needs and give everyone confidence that the right decisions are being made.

There are a wide variety of user research techniques for researching new products. Different techniques become more appropriate at different stages in the development process, from concept, prototyping, launch, iteration and eventual retirement.

When developing a new concept for a service or product, we use user research to understand where the needs of our users and potential users are being met and where there are gaps in the market waiting for something to be developed to enhance users' lives. As the infamous quote about horses and cars attributed to Henry Ford suggests, people find it difficult to imagine and articulate what it is they want or need if we simply ask them what's missing from their lives.

We use research techniques to identify the gaps and opportunities by understanding consumers' behavior, their lives, where they struggle or where they have workarounds and hacks, such as using a product for something other than its intended purpose or being forced to depend on inferior products and services because superior alternatives aren't available or affordable.

When is the right time to do user research in product development? The pragmatic (and simple) answer is: any time. The ideal answer is: all the time or, rather, as often as possible when user research will have the most impact and the greatest positive effect.

The right time to do user research not only depends on where you are in the development cycle but also what you want to find out, your objectives. To do effective research you need to be clear about the purpose of the research.

Stage 1: Discover

At the inception of a concept, after some initial thinking, you should be doing research to understand whether you are going in the right direction. By understanding the way people behave and think you will get an understanding of whether your concept is going to enhance their life somehow or solve a problem they are experiencing.

Stage 2: Define

If you now have evidence that it's worth investing in the new concept, the research can indicate which options(s) will be most fruitful to pursue. This is when you can refine the concept of the product and its purpose. At this point, further research can be done more deeply into users' behavior and thinking around the options available to them.

Stage 3: Develop

This is the stage where potential solutions, on a small scale (single features of a solution) or a large scale (a user journey), are prototyped and discarded or iterated based on evidence gained from appropriate participants during user research.

Stage 4: Deliver

Assuming the product continues to launch, when it's out in the world, being used, there is never a bad time to do user research with the aim of understanding how it can be improved. If your analytics/feedback show that something isn't working but it is not clear what the problem is, user research helps you to understand what's going on. To ensure your product/service is still useful and usable, iterative user research will help you keep track of if and how you are meeting users' needs.

Stage 5: Retirement

User research will also help you understand when it's time to retire your product because, for example, users need something completely different.

Aims and objectives

It is useful to articulate and share with stakeholders (anyone somehow involved in the project), the aims and objectives of your research at each stage of development, whether the product/service is being developed in an agile, waterfall or other type of process. Get everyone to agree to them before you start putting effort into doing the research.

Who should take part in the research? As with market research, getting the right user research participants is key to getting high-quality data. Participants might include existing customers, potential customers, customers of rival products or those using products in adjacent markets. Essentially, people with appropriate behaviors, trying to achieve tasks and do things your product is aiming at. It is important that in each round of research you have a representative sample of users.

What techniques to use and when do I use them? I describe how and when to use various user research techniques in my book User Research, such as usability testing, contextual inquiry, ethnography, card-sorting, guerrilla research, etc. I also give some examples of combining different techniques since, as I've mentioned, this is particularly relevant when considering the whole development cycle. There isn't one correct way to combine methods but there are some common ways of working. I have included an example here to give you an idea of how you could combine methods yourself.

Do some guerrilla research. You can quickly and cheaply gather some initial evidence and insight to demonstrate how users think and feel about a topic and how people behave and do things in the real world.

Hold a stakeholder workshop. Get all the relevant people in the same room at the same time to share the

understanding of the current situation, pitch ideas, agree the scope of a project and gather initial requirements. You can use the evidence gathered from the guerrilla research to support the idea(s) being pitched and discussed.

Do some contextual inquiry or ethnography. Once you have internal agreement of the scope, it's time to get feedback and insight from the actual users or potential users. You are validating (or overturning) stakeholder assumptions from the workshop and the initial guerrilla research and gaining insight into users' behavior and their barriers. Depending on the time you have available you can choose another user research method suited to asking broad questions, finding out how things work in the real world, in a particular context.

Do some prototype usability testing. The contextual research will provide insight into whether the concept is worth continuing to develop and what direction that development could take. Once you have more fleshed-out ideas of the new product/

service you can also do research on these. You don't need to wait to have something tangible before you put it in front of users; for example, you can use sketches on paper that describe what you intend to do.

Iterate. The insight gained from usability testing should be used to improve the prototype, which can be tested again to validate the changes made. Once a new or improved product or service has been launched, the insight-improve-validate cycle should continue. You can to combine usability testing with guerrilla research as prototypes are iterated. Guerrilla research can quickly give insight into how small things (with a narrow focus) can be progressed and improved. It can highlight where issues are being experienced by users.

As the product/service progresses in the development life cycle, other user research techniques will be more appropriate but it very much depends on what you are developing and what you need to know. Keep in mind that guerrilla research should never be the only method used as

it's not rigorous or in-depth enough. It is, however, useful to combine it with other methods.

Not meet user needs

I have seen products and services into which a great deal of development time and effort was invested fail to meet user needs because no one took the time to conduct user research.

When I was a consultant I worked with a retail client that had spent several months developing a highly interactive prototype to help users design rooms in their homes and place products from the retailer in a 3-D rendering of their room so that they could fully visualize how things would look. These interactive prototypes (built for touchscreens) were developed without user research. I was brought in to do some user research on the functions of the prototype and found that it was only partially meeting users' needs. The idea was not completely wrong (although this can happen) but the product was much more complex than it needed to be. The retailer had not considered the needs of the users at an early stage. Participants felt it required too much time and effort to learn how to design a 3-D room to purchase items from the retailer considering how irregularly they would do so. They would have much preferred a 2-D bird's-eye view layout which they considered quicker and easier to produce.

In these types of situations, however, keep in mind that when you are offering something completely new, you may want to start small and simple and iterate, adding new features over time as users start to incorporate your product or service into their lives. If you are innovating, pushing the boundaries and providing people with something they haven't seen or considered before, you can change habits and behavior but this takes time as there is a certain amount of inertia to overcome. This reality should be considered when developing something new; it should inform your underlying understanding of users' reactions during testing and after initial launch. If the product/service is providing a valuable experience for users, they will make the effort to learn the new ways. If they do not consider it valuable they will walk away and find something else.



Behavior and opinion

One of the key things to think about when doing user research is the difference between behavior and opinion. If you are looking to understand how people behave you can include a much smaller number of people in your research. Behavior in the context of services and products is about how people undertake and complete tasks; groups of people with a similar background and motivations for doing something are usually quite consistent.

We all like to think we are very different and unpredictable as people. This is simply not true. We all have a lot of learned behavior, shared cultural and societal understandings of how things work on both a macro (society) and micro (families, individuals) level. As you drill down (moving towards the micro level), smaller groups (user groups) that have been segmented in the right way will have similar experiences and therefore a shared understanding of how things work. Designers will already know this; this shared understanding is why we have design patterns for how to build things.

If you are doing usability testing, after a few sessions observing people doing the same tasks you will start to see a lot of repetition in how people behave and how they get tasks done. However, there might be quite a lot of variation in how they feel about it and what they think of the experience. Some of the difficulty with opinion is that people aren't always willing to tell you what they think – or they don't really know what they think. I have often heard in user research, when asking people what they think, something along the lines of, "Most people will struggle to buy gloves from this Web site and they won't like it but I found it easy and enjoyed it because I am an Internet expert." The truth is, most of the time we don't really know what other people think.

Another point to consider: Sometimes it is obvious to participants when they have correctly completed a task, sometimes it is not. This will also affect their opinions and views on what they have done. If they don't know exactly what success looks like – for example, it's not as clear-cut as "buy a pair of gloves from this Web site" – they may not know they have failed the task and may feel they've had a very positive experience.

Done at each stage

User research can and should be done at each stage of the development of a product. There are multiple stages of any development cycle but the types of user research to be done can broadly be grouped in three main categories for product development teams: understanding potential users and their lives; working out what should be built next; and testing things that have been built. There are many different techniques that can be used but the

right combination of user and market research methods, employed effectively, will help ensure that we get product development right at each stage, from concept to production to retirement. ①

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¹ Will Myddelton, 2018. www.myddelton.co.uk/blog/three-types-of-user-research.

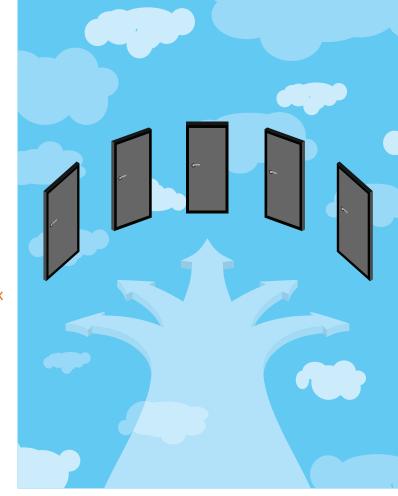


••• online research

Measuring the impact

Is there a list-order bias in online survey matrix questions?

| By Philip Derham



snapshot

Philip Derham used three case studies to test for the presence of a list-order bias in online surveys. Matrix questions are commonly used in online surveys when several statements, products or services are to be measured on the same scale. For visual economy and for ease in answering, the statement and scale questions are shown as one question. This format has led some researchers to require statement lists in matrix questions to be rotated, to avoid a hypothesized list-order bias. The list-order bias concern is that online survey participants may be more likely to answer the first listed statements and be less likely to answer statements lower on the list.

If the list-order bias hypothesis were valid, it would lessen the information collected, when answering each statement is not compulsory for participants to be able to advance to the next question or screen.

A solution available in online survey software is to rotate the list order, so that all statements on a list are equally advantaged or disadvantaged. This practice assumes the list-order bias hypothesis is valid.

Results from a recent online survey encouraged us to review the list-order bias hypothesis and this article summarizes recent online survey findings about the list-order bias. The initial findings (with caveats) suggest that there is not a list-order bias. Others may wish to review their findings to see if this initial study's conclusions hold more widely.

Case studies and research practice

The case studies discussed in this article are from online surveys with business, shopping center store and bank customers, recently undertaken by Derham Marketing Research in Australia. As a matter of practice, participants in our online surveys can move from screen to screen without being required to give answers to each question. We use skips, where needed for sequence logic, if a question or statement is not answered.

This practice replicates the freedom to answer or not answer that participants had



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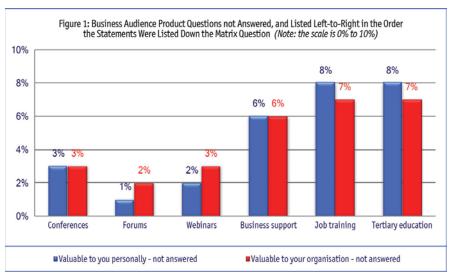


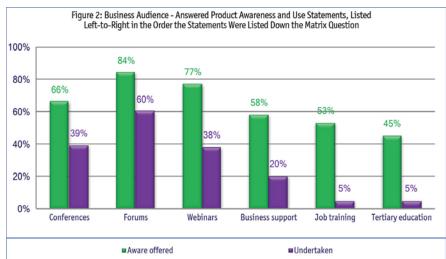
Usability



Eye Tracking







with paper surveys in the past and enables participants to continue a survey without forcing an answer, in cases where the preset answers do not match the participants' views.¹

Three case studies are analyzed at the all-participants level, regardless of the device on which the survey was completed. A further analysis was then undertaken to see if there were differences in list-question answering if the device used was a mobile (cell) phone rather than a computer or tablet.

1. A business audience case study

The first case study reviewed was of a business audience, in a survey that used a six-statement list and a seven-point rating scale (which included a Don't know/Can't say/Not applicable/Not used scale point). The scales used were to assess the value of the services available to the participants, the participants' satisfaction with those services and whether the participants

had recommended the services. The services were shown to participants in this list order: conferences; forums; Webinars; business services; job training; and tertiary education.

Initially, the answers to the statement list did appear to show a listorder effect, as Figure 1 shows.²

Further analysis suggests the association of not answering a statement in the list may have more to do with whether the participants were aware of the product and whether they had ever used it than with the list order (Figure 2).

These two findings stimulated us to look at results from other online surveys.

2. A shopping center store case study

The second case study was of a coffee shop in a shopping center. That survey asked about items bought during the last visit to the shop and used a set, seven-item list – breakfast all day; lunches; catering; cakes and puddings; special-occasion cakes; coffees; snacks – and a three-point scale of Bought, Not bought, and Can't say.

In the shopping center store study, the not-answered statement relationship seems to be with the numbers of people who had purchased each particular product rather than with list order, the data in Figure 3 suggests. The more people who bought the product, the smaller the not-answered proportion of participants was.³ The coffee example illustrates this clearly – most people bought coffee from the coffee shop, and accordingly, very few did not answer that question.

3. A banking customer case study

Set order matrix questions from bank customer surveys were also reviewed to test the initial findings further. In the bank surveys, customers had been asked to respond to two matrix questions, each of five statements and each with a 12-column Net Promoter Score scale.

The data (Figure 4) show almost all bank customers answered each statement and that few did not answer each statement.

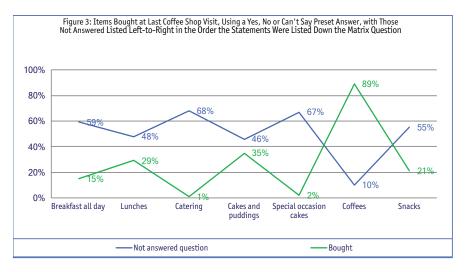
These findings suggest that there was no list-order bias on the more complex 12-point scale, just as there was no list-order bias when the simpler three-point scale was used in the shopping center store survey. This congruence of findings indicates that scale size or scale breadth does not influence participants to answer or not to answer a statement in a matrix question.

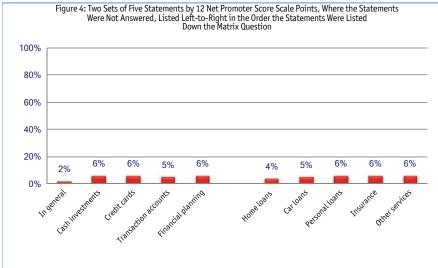
Does not appear to influence

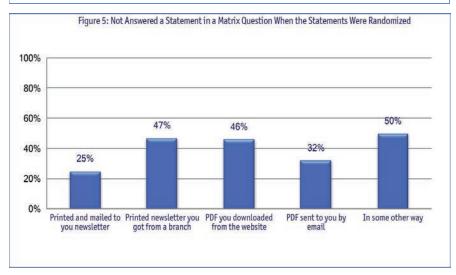
These three case studies suggest that a set statement order in matrix questions⁴ does not appear to influence whether participants answer each statement on the list.

The next step in testing the listorder bias hypothesis was to review the not-answered responses from matrix questions in a survey in which the statement order was randomized.⁵

The data in Figure 5 suggests that it is the content of the statement, rather than the statement position on the list, that influences whether the statement is answered or not, when the statements are randomized.







The influence of the devices used to complete the survey

The look of the matrix questions differs when on a computer or tablet screen and when on a mobile (cell) phone though the statement list order remains unchanged. The question then was whether the different question look and smaller screen size

of the mobile phone online survey led to list-order differences. There are two main differences in presentation on a computer or tablet when compared with the presentation shown on a mobile phone. The matrix question appears as a matrix question on computers and tablets but on the mobile phone, each matrix list question is shown as a separate question

and each statement has its own dropdown answer box.

Also, answering a question on a mobile phone requires two clicks to answer. One click is needed to open the Select descriptor in the panel and a second click is needed to choose the answer. The matrix questions when seen on computers or tablets require only one click per statement to answer it.

The business audience was too small to usefully analyze (all except 3 percent of the business audience completed the survey on a computer or tablet). The larger shopping center store audience was reviewed and differences between the full sample and the mobile phone sample are shown in Table 1. That data showed that significantly more mobile phone users did answer the three-scale matrix question statements in the mobile phone format than did participants in total.

While this finding suggests there may be advantages in using individual drop-down answers in scale statement questions, data from the banking study is less conclusive.

The product use statements (Table 2) could be read to indicate slight support for the shopping center store results (mobile phone users answer list statements more fully than do participants generally) but the findings shown in Table 3 suggest that mobile phone participants are a little less likely to answer list statements than participants generally.

These findings about mobile phone user scale statement response levels in the banking survey are slightly inconsistent and do not offer clear guidance on the not-examined issue of whether matrix scale questions as seen on computers and tablets or matrix questions seen as single statements with drop-down screens on mobile phones are better practice more broadly. Responses from other researchers on this separate issue would be welcome.

What stands out from the shopping center store findings in Table 1 and the bank findings in Tables 2 and 3 is that there was no list-order bias in the not-answered questions among those who answered the survey on a mobile phone. Their answering

pattern is consistent with that of participants overall. This suggests that while the visual presentation of the list statements on mobile phones differs from matrix questions seen on a computer or tablet, when the list order is the same, participants respond to the statements themselves, not to the list order.

On balance, then, it seems that surveys completed on mobile phones also do not have a list-order bias.

Conclusions

The preliminary results suggest that there is not a list-order-bias in matrix questions when seen on computers and tablets and that other factors? influence whether participants answer statements in a matrix question list' when seen on computers or tablets.

The evidence for or against the list-order bias hypothesis in online surveys completed on mobile phones, when matrix questions are converted to be individual question statements and drop-down answer boxes, is less conclusive. These initial findings still indicate that the list-order bias hypothesis is not substantiated. Findings from other researchers, on the impact of matrix question presentation on mobile phones, are sought.

Our overall conclusion is that this initial study suggests that the list-order bias hypothesis is not substantiated. As a result, there appears to be no need to randomize matrix question statement lists in online surveys.

A secondary conclusion is that matrix question scale points (of up to 12 points) do not influence participants' decisions to answer or not answer statements. Other factors influence that decision.

Views and evidences from other researchers on this topic are welcomed. ①

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- ¹ Nonetheless, in our surveys, most participants answer most questions.
- ² The same pattern was noted for the satisfaction and recommendation questions. Data for these questions has not been shown, for space and graph legibility.

Table 1: Not-Answer Proportions from the Shopping Center Store's "Bought on Last Visit" Statement List

Answered statement	All participants - not answered	Mobile phone users - not answered	Advantage of mobile phone use
Breakfasts all day long	59%	45%	+14%
Lunches	48%	39%	+9%
Catering	68%	51%	+17%
Cakes and puddings	46%	35%	+11%
Special occasion cakes	67%	52%	+15%
Coffees	10%	8%	+2%
Snacks	55%	44%	+11%

Table 2: Products Used - All Participants and Mobile Phone User Participants

Answered "Used in the last 3 months" statement ⁷	All participants Mobile phone users		Advantage of mobile phone use			
Branch visit	90%	90%	-			
ATM use	88%	93%	+5%			
EFTPOS use	90%	92%	+2%			
Phone banking	90%	91%	+1%			
Call center use	90%	91%	+1%			
Internet banking use	95%	94%	-1%			

Table 3: Net Promoter Score Answer Rates - All Participants and Participants Who Used Mobile Phones

Answered Net Promoter Score statements ⁸	All participants	Mobile phone users	Advantage of mobile phone use
In general	98%	96%	-2%
Cash investment	94%	93%	-1%
Credit cards	94%	92%	-2%
Transaction accounts	95%	93%	-2%
Financial planning	94%	92%	-2%
Second question set			
Home loans	96%	94%	-2%
Car loans	95%	93%	-2%
Personal loans	94%	91%	-3%
Insurance	94%	91%	-3%
Other services	94%	91%	-3%

³ It is also possible that not answering a statement is a form of answer too. The participant may essentially be saying the statement and/ or scales assessing my response to the statement are not relevant to me. This was not tested in the survey, as the scale was assumed to be relevant, but this possibility may be worth further review.

⁴ With the caveats of a maximum number of seven statements, and the Australian context, noted.

⁵ The matrix question with the randomized statements asked how customers had read the last issue of the bank's newsletter.

⁶ The low level of answered questions and high level of not-answered responses may have been because of low participant interest in a bank newsletter, as a subsequent question found that only 10 percent of bank customers wanted to receive a newsletter from the bank.

⁷ The two sets of six-statement matrix questions used a six-point scale, which included a Do not have/Did not use/NA answer point.

⁸ The two Net Promoter Score matrix questions each used a 12-point scale, which included a Can't say scale point.

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••• qualitative research

Remember what's important

Despite all the new tools, stick to the fundamentals of good qualitative

| By Kirsty Afshar Bennett



snapshot

Kirsty Afshar Bennett argues for the value of effective listening and careful attention to language to deliver qual insights. Excitement about the burgeoning array of new, technologically enabled methodologies for qualitative research is reaching fever pitch. A quick look at industry articles, conferences and qualitative awards spotlights the promise of a renewed direction, a "brave new world," for those of us engaged in getting into consumers' hearts and minds on behalf of the brands we serve.

These are thrilling times for sure. We now have the ability to get up-close and personal into the lives and thoughts of targets. We can use video and interactive components, social media engagement and analyses, etc., to paint vivid pictures of what their lives are like – providing insight into opportunities and challenges for brands to mine. That said, I believe a word of caution is required here. Why? Because the fundamentals of exploring the human psyche and the keys to influence it – regardless of whether that takes place in a traditional focus group or digitized ethnography/interactive smartphone app – remain the same.

That "same" is that the real success of any project depends upon the skills and expertise of the researcher/moderator to keenly understand the core fundamentals of qualitative research as well as how to navigate them to uncover what's really going on (not just what the consumer presents/tells us is going on). Ultimately, our job is to frame the true problem and identify inspiring solutions and exciting opportunities.

I fear that too little attention is paid to really understanding these fundamentals and identifying methodologies to address them. And I also fear that as an industry we do a very poor job of educating our clients on them.

So, let's not be so blinded by the shiny new things that we forget to value what's most important. Because if we are blinded by "shiny and new" we won't see the real insights we set out to seek.

It's time for the qualitative industry to get back to basics and focus on honing the fundamentals of qualitative inquiry. So in this piece I'll focus on the fundamentals.



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Inconsistent and fickle

"There's now't so queer as folk!" is a Yorkshire expression (from where I grew up in the U.K). In translation: People are strange! When you study them, they say things they don't really mean; they act in ways that contradict stated beliefs; they can be inconsistent and fickle in some ways and stubborn in others. We are all these people. And "people" are not particularly good as research subjects.

As people, we'll tell others what we think they want to hear or what we believe the appropriate response should be and we struggle to articulate issues we have never been asked to contemplate before. We become emboldened when we feel supported and entrench when we feel challenged or attacked. We have been schooled by marketing conventions and can fall subject to cognitive dissonance – all of which can automate our responses. Talking to us can be frustrating and complex, a true challenge for those searching for simplistic answers.

A skilled qualitative expert/moderator must have the honed instinct and skills to identify such issues and the expertise and tools to break them down and get beyond them; to map out true core insights that inform a real understanding of the current mental architecture.

Different meanings

Almost every category you can imagine has everyday language that is used by consumers and marketers alike but which communicates broad/different or undefined meanings. Let's take cold remedies for example. "Relief" is commonly used as the desired benefit or product claim. But does the individual mean "relief - elimination/ absence of cold symptoms" or are they really expecting "relief - lessening of intensity/bother"? "24-hour remedy" might imply "dosage – take one every 24 hours" or "its effect lasts a full 24 hours" – obviously two different ideas. Non-category-specific examples include: When someone says "tired" are they meaning "tired - sleepy" or "tired - fatigued"? When a Web site is "easy" is it "easy – not difficult/hard" or "easy - quick/no hassle"? Likewise, if something is "simple" is it "not hard" or "quick"? Could be both but might just be one versus the other.

Interpreting the specific meaning

in any particular situation is not an academic semantic exercise. It is crucially important, because it informs our understanding of the situation and helps us consult ourselves – and importantly our clients – in their optimal use of language.

Uncover what's at the core

The mind doesn't know what the brain doesn't want it to know. Psychological defense mechanisms often inhibit individuals from acknowledging and articulating innermost thoughts and feelings. But this doesn't mean they aren't there. They are. They're deep, entrenched and protected. Skilled techniques are required to help uncover what's at the core of people and break through denial. For example, individuals may find it easier to associate and define such feelings if they can associate them to some other individual (think jealousy, resentment, embarrassment, etc.).

Likewise consumers are ill-equipped to imagine what could be versus what is. They can only assess a new idea within the context of their current mental architecture. But, oftentimes, the real brand opportunities might lie in challenging the status quo or reframing the landscape and thus exploring future-oriented solutions. Skilled researchers need to help individuals conceive of and imagine new scenarios.

We want an absolute

Why do qualitative practitioners use "scoring" of ideas or concepts but then tell clients not to pay attention to them? Firstly, let's address why even when those behind the glass are told not to pay attention to them, they do. Because as human beings we want an absolute. (This is why, in some cases, quantitative research is wrongly dominating but that's for another article.) Our job in qual is to help clients understand the role of scores and scoring, their limitations and how to optimally score. So here it is:

The role of scores/scoring. Scoring helps ensure that individual participants actively engage in personal contemplation. It also acts as a barometer for a moderator to feel the climate in the room and direct probes appropriately – providing an efficient way to identify issues. And finally, scoring can provide a quick confirmation of go/no-go areas if they correlate (or not) with the team's

strategic thinking, allowing an efficient focus on key topics and stimuli.

Limitations of scoring. It has to be understood that a single word or image or secondary idea can cause an individual to score something low or high. Perhaps even more significantly, an individual's state of mind and their scoring parameters typically change throughout a session as they become more comfortable or familiar with an idea or topic. This is because their understanding changes and they "play" at the research process; their context changes. In addition, participants in a study typically have different scoring parameters based upon their individual personalities and a skilled moderator gets to know these personalities quickly.

Finally, number scores such as 1-10 or 1-5 can be extremely vague and don't get to the heart of whether something is exciting, credible, motivating, interesting, compelling. Even when these are explicitly defined, participants will struggle to score according to the definition (particularly important in claims evaluation) and to disconnect a score from the idea vs. the product (key for any creative exploration).

As such, it is crucially important that all associated with a research study firmly understand the role of scores and teach clients what they mean in the context of the overall exploratory.

Optimally using scoring. What I do is to develop qualitative scoring (not numbers) such as bad, good, wow. This helps me, and the client, dimensionalize scoring with added layers to discern if an idea is "expected" or "totally new" so as to really understand what's going on inside the target's head.

Not be blinded by the new

In this new Wild West of technologically enabled qualitative, please let's not be so blinded by the new and shiny methodologies that we forget the fundamentals. All of us, clients and research companies alike, must keep the focus on the consumers who are at the heart of our process and remember that the best methods are the ones that get us closest to the insights we're after.

Kirsty Afshar Bennett is co-founder and president of The Parkel Navigation Group, a Ridgefield, Conn., research firm. She can be reached at kirsty@parkelnavigation.com.



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Decoding the drivers of brand equity

Making brand health trackers more impactful

|By Jayant Rajpurohit and Aaroshi Asija



snapshot

The authors explore ways to improve upon traditional driver analyses by using partial least square regression.

Marketing professionals face many challenges when seeking to adapt their brands to shifting consumer trends and needs. With the ever-changing competitive scenario, your brand is at a constant risk of being eliminated from the customer's mind, which puts a lot of questions in front of the brand manager/marketer:

How do we keep the brand up to date? Is the brand performing well on attributes that are currently of value to consumers/users? Are the attributes that influence brand equity changing?

What marketing levers are available to work with? What tangible and functional attributes can the brand activate? How do we activate emotional attributes such as trust?

What's the best mix of marketing resources? Is the brand equity driven by attributes of campaign (awareness), innovation (uniqueness and variety), messaging/copy (softer emotional and perceptual attributes), channel (point of purchase), pricing (value for money), etc.?

Is the brand winning against the competition? Is it performing well compared to competition on the attributes that matter?

All these questions have roots in a larger one: How are functional and emotive brands driving the brand equity in the market? For a traditional driver analysis, we could sift through different attributes and identify which ones need investment through campaign (awareness), innovation (evolving needs/changing drivers), packaging (usage experience attributes) or pricing (value for money). But this is easier said than done, as a traditional driver analysis does not provide all the answers for the above questions.

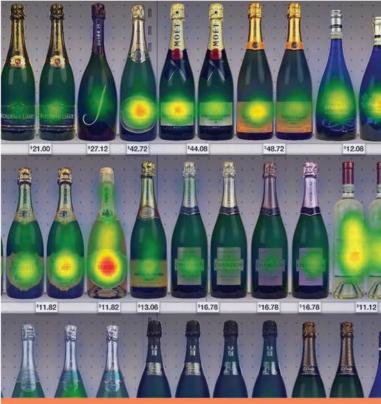
The aim of a traditional driver analysis is to identify the drivers of brand equity rather than how these attributes are driving brand equity. The most simplistic driver analysis gives the marketer an understanding of where his/her brand stands in the



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market on the most important brand attributes but it would be unable to precisely measure questions around the following areas:

Tangible versus intangible. Soft attributes like perception of the brand (such as trustworthy, youthful, a leader, calm, etc.) are difficult to act upon. If these come up as important attributes, how do you find out which tangible attributes contribute to the softer attributes? Can a soft attribute be tied quantitatively to a tangible metric, e.g., can trust in a food product be quantitatively measured through the presence of organic ingredients or the fact that it was recommended by friends and family, etc.?

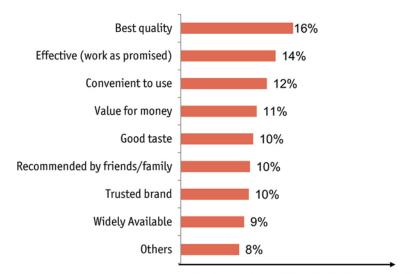
Interlinkages. The real measure of an attribute is not just its relative importance calculated through beta coefficients of key driver analysis (as shown in Figure 1) but through other indirect impacts it has on other attributes as well. Hence, we need to understand how these attributes connect or impact each other.

What constitutes true brand equity in the market? A traditional driver analysis uses regression as a technique to identify the key drivers of brand equity. In this process the survey responses for the brand perception attributes are input as independent variables. But there is always a necessity to define a metric (read: brand equity) as a dependent variable, against which the regression will run, thus creating a burden to use proxies for brand equity for the dependent variable, e.g., in Figure 1 it is likelihood to recommend the brand. Sometimes a combination of CSAT, likelihood to recommend and likelihood to repurchase is also used. These proxy metrics are stated responses from the survey, hence the regression is not for drivers of brand equity but for these stated variables (which are assumed to represent brand equity). Structured equation modelling doesn't require this necessity of a dependent variable but rather produces a brand equity metric as a latent variable.

Solve for the drawback

If we could regress (or model) the attributes (both emotional and

Figure 1: Output Of a Traditional Driver Analysis



Relative importance in driving likelihood to recommend brand

functional attributes and other metrics such as awareness, recommendation etc.) without the need for a predefined or calculated dependent variable (similar to Bayesian models, where latent variable definition suffices if we have a list of independent variables; we'll explain latent variables later in the article), we would be able to solve for the drawback of traditional driver analysis. This can be achieved through partial least squares modelling, where brand equity is our latent variable, i.e., it doesn't exist as a number, but all variables would interlink and model towards driving this final dependent variable.

Brand health trackers capture customer perceptions through different salience measures across all respondents. Trackers also measure satisfaction and recommendation among users but when these metrics are used as dependent variables, they exclude non-users. Our framework was designed to best capture the essence of two customer groups - user and non-user. A user would have knowledge about the brand based on its current/past usage, whereas a non-user would have limited experience with the brand and the brand's equity would largely be driven by perceptions. Hence when modelling we need to separate the datasets for the two populations.

We arrived at the brand equity

score with the help of partial least squares (PLS) regression. PLS multivariate regression is a variance-based structured equation modeling (SEM) technique that gave us the flexibility and robustness needed to merge these two models of users and non-users.

SEM establishes the relationship of cause and effect between different variables. One of the outputs – path diagrams – shows the variables interconnected with lines that are used to indicate causal flow (i.e., it establishes cause-and-effect relationships between variables). Structured equation modelling is an umbrella term encompassing several statistical methods to achieve the similar outcomes. Unlike other SEM techniques, PLS:

- accounts for dependent variables which may not be quantified (i.e., we do not have the final brand score available in the raw data for each respondent);
- considers the indirect effects of independent variables, i.e., not only does it establish the impact of a variable on the latent variable (for example, brand equity) but it also measures the indirect impact through interlinkages;
- constructs the model with many interrelated predictors/variables.

PLS regression calculates the value of a latent variable (brand equity

Figure 2A: Path Map - How Latent Variables Are Mapped From Attributes Fed to the System

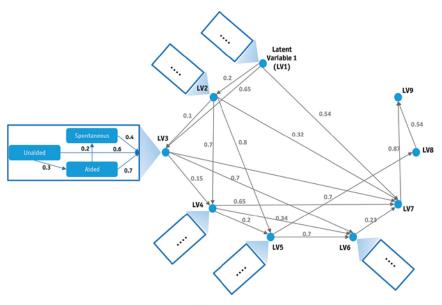
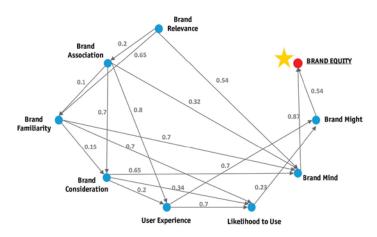


Figure 2B: Naming The Latent Variables - Like Naming Factors of Attributes in a Factor Analysis



score) from indicators (independent variables) after multiple iterative regressions at the back end. The model ensures that the calculation of dependent variables would also be a function of inter-collinearity between independent variables.

PLS is available as an open-source package on R (plspm library) and other platforms as well. In this article, we focus on its advantages and interpretation and offer a use case for marketing research in brand equity.

Two main outputs

There are two main outputs of a PLS model through R: path diagrams and the impact of independent variables (attributes) on brand equity (indirect and direct).

Path diagrams. The chief strength is expressed in path dia-

grams, allowing clients and researchers to better understand the output. The path diagram takes the individual attributes and creates several latent variables. Each latent variable is a factor of several individual attributes that were tested in the survey. The output shows us the relationship of these latent variables with the attributes and with each other but it does not help us name them for a linear understanding. This is where we need to bring in business sense and name these latent variables. In Figure 2A we show a condensed map of latent variables with the relationship to one another. To illustrate how individual attributes make these latent variables we show the impact and contribution of aided, unaided and spontaneous awareness in driving a latent variable (LV3). This latent variable, in turn, impacts

several other latent variables, which in turn impacts brand equity.

Both Figures 2A and 2B explain the journey of getting latent variables from attributes/input variables and naming them. In Figure 2B we illustrate the journey of naming these latent variables. Just like we named latent variable 3 "brand familiarity," we name the other variables based on their input variables. Like brand perception, familiarity and word of mouth play big roles, as does user experience, in determining a brand's position in a customer's mind. Our framework was set to translate these softer variables into an index that could be tracked over time. You will notice that latent variables 7, 8 and 9 do not have any significant attributes contributing to them. Figure 2B refers to them as brand mind and brand might, respectively. We clarify this dilemma below.

How to name latent variables driven by other latent variables.

We looked at the latent variables feeding into latent variables 8 and 9. Figure 3 explains this in a flowchart. In summary, brand mind and brand might are latent variables. Looking at them, we could see emotive attributes such as perceptions of a brand as a "leader in the market," as innovative, fun. "a brand for me" and likelihood to use, and hence decided to use the term "brand mind." Functional attributes such as brand awareness, user experience such as CSAT, repurchase, frequency of usage, etc., would impact a latent variable, showing the might of the brand in the marketplace. We named this "brand might" (its actual power in the life of the consumer) and together with brand mind it made brand equity.

Evaluating impact. You can calculate the impact two ways. One way is a direct multiplicative model to understand the relationship between individual attributes with brand equity; the other is calculating the single brand equity number.

Direct multiplication. Going beyond stated awareness level, we calculate the impact of spontaneous awareness versus aided awareness in driving brand equity. You can clean the map by choosing specific attributes and calculating the impact on specific

Figure 3: Calculating Brand Equity Score

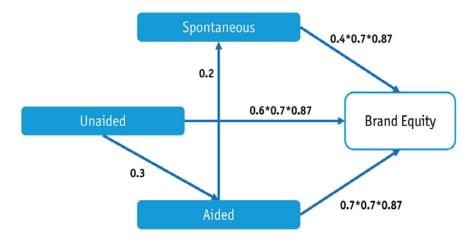
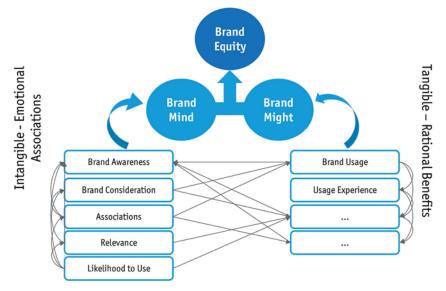


Figure 4: Impact of Attributes on Brand Equity



latent variables. For illustration, we chose the example of calculating the impact of awareness on brand equity. Here the impact of spontaneous awareness is multiplied by contribution of LV3 (i.e., brand familiarity) to LV7 (brand mind), further multiplied by the impact of LV7 to brand equity. This would be the next impact of spontaneous awareness (as shown in Figure 4).

Constructing one equity number. You can also bring together a host of independent variables and create a path for them to formulate one composite score, which can be tracked. Our framework calculated a brand equity score, which was defined with the help of the equation below. You would calculate the latent variables through the attribute scores which in turn would calculate the brand

equity score. The equity score is indexed for tracking and ranges between 0 to 100. It can be measured for each respondent, for each brand. It is comparative, linear and relative in nature. An equity score of one brand can be compared to another like any score on a scale. Here is an illustrative equation using the path diagrams shown in Figure 2B:

Brand Equity = 0.87 x Brand Mind + 0.54 x Brand Might

Brand Mind = 0.54*Brand Relevance + 0.32*Brand Association + 0.7*Brand Familiarity + 0.65*Brand Consideration

Brand Might = 0.23*Likelihood to Use + 0.7*User Experience

Strength of an attribute

Using a path map, we know which other attributes are impacted by a

certain attribute. These path diagrams can then be analyzed as shown in Figure 3. Using interlinkages, we could calculate the actual strength of an attribute versus a traditional key driver analysis (KDA).

Traditional KDAs overestimate the importance of some attributes that emerge as key drivers through regression. And these results may change dramatically every time you run the regression on a new data set due to sampling error (e.g., latest survey data versus old survey data). Our approach solves both these problems, hence the results are more believable to the audience. The results don't change dramatically over time (if we do the survey every year or on regular intervals) and also provide a detailed path map illustrating what other attributes are contributing and influencing a key driver. Also the results don't change dramatically.

Table I shows how results from traditional KDA are different from SEM results. It shows the difference in the relative importance. The ones calculated by PLS are much more stable and accurate (we know this because we can trace the composition variables for each variable as described in Table I).

You can also do a crosstab of direct and indirect impacts. Table 2 shows how the PLS equation allows the researcher to know the impact that aided, unaided and spontaneous variables have on different attributes. The contribution table essentially states the coefficients for each variable. This can be further converted into individual equations. And this can be done for all variables in the path map (Table 2).

Traditional regression would have its beta coefficients moving drastically for every iteration with new survey data coming in. This is because it accounts for collinearity but does not lay out the map of the interlinkages. Through structured equation modelling using PLS regression we can see these interlinkages and calculate the relative importance (which doesn't change as new data appears).

A further advantage is that this exercise can be run using the existing brand health tracker data and needs no new data collection. We can com-

Table 1

Attribute	Traditional KDA Relative Importance	SEM Through PLS Relative Importance		
Likelihood to use	35%	28%		
User Experience	20%	15%		
	14%	10%		
Brand Salience 11%		9%		

Table 2

Structured Equation Modelling								
Relative Importance	Contribution to Dependent Variable Through Other Variables							
	Aided (A)		Unaided (B)		Spontaneous (C)			
	Direct	Indirect	Direct	Indirect	Direct	Indirect		
28%	0.88	0	0.25	0.33	0.13	0.43		
15%	0.66	0.10	0.14	0	0.83	0.08		
10%	0.09	0.74	0.67	0.13	0.06	0		
9%	0.12	0	0.60	0	0.53	0		

bine data of past waves of trackers to ensure a robust model with large data set.

We do not recommend executing a PLS-based structured equation model for every wave of the brand health tracker but it should be conducted at frequent intervals to ensure that the brand tracker is measuring the health of the correct metrics. Further, it strengthens the ability of marketing professionals to act on the findings.

As a rule of thumb, we recommend that the structured equation modelling for brand equity should be revised at the same frequency as segmentation. For example, if it is a highly evolving market where the segmentation is revised every two years or less, the same frequency should be applicable for the brand equity model.

This technique has been applied with success and has confirmed acceptability in three main business-toconsumer industries:

 Subscription-based models (print and content-streaming).
 Brand equity is prime in ensuring subscriptions, clicks and land-

subscriptions, clicks and landing on Web pages. Here the model also validated some of the missing consumer nuances that the attribution modelling using digital data was unable to provide, e.g., which messaging trait enticed consumers to click through one service over

another, etc.

• Consumer packaged goods. Softer attributes such as trust, youthful, premium, exciting and friendly always come up as important in brand perception but marketing professionals struggle to associate these with packaging, user experi-

- ence, value for money, availability and type of influencers.
- Hospitality (hotels and cruises). Since interlinkages of attributes are very high in this industry, things such as value for the money could be quantified through their connections with other attributes and offerings by the hotels/cruise lines.

Apart from these, the technique has also seen traction with a business-to-business case of a consulting firm trying to understand its equity versus other premium consulting firms. In each case the technique has helped the organizations realign their priority brand attributes and learn the levers of brand equity in the market. ①

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7ith a career of over 30 years in market research. Chelle Precht has built up an immense collection of work experiences and skills that have led her to become a go-to source of knowledge for many.

Chelle honed her skills at Burke/ Bases and other research companies before starting her own company,



Complete Research Connection (CRC), in 2003. Executing thousands of projects while at these companies has enabled her to ascertain the many intricacies of a successful marketing research project. This allows her to offer superior service and actionable

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has consistently offered high-quality work and support to her peers. Chelle's role today is multifaceted, working as a researcher, moderator, auditor, field manager as well as administrator of CRC.

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LYNN WELSH, CHIEF STRATEGY OFFICER, OLSON RESEARCH GROUP

I ynn Welsh has been a driving force behind establishing Olson Research Group as a leader in health care marketing research.

Olson Research was founded in 1995 by a formidable woman in research, Susan Olson. Shortly after, Lynn and current CEO and owner Chip Olson joined Susan to create a research firm dedicated to providing high-quality deliverables with superior client service. What started as a niche agency has grown into a solid, 50-personstrong firm that supports the marketing decisions of global pharmaceutical companies, medical device firms and related consultancies. Olson Research also offers a la carte options such as access to a robust physician database, recruiting prowess and high-caliber programming capabilities to marketing research firms and independent researchers.

Olson Research sets itself apart by staying true to its core values. "From the outset, our focus was on being an agile research partner, providing dogged recruiting and superior client service and we have not wavered," says Lynn. "In fact, as we have grown we have only improved on these tenets."

Olson Research's health care provider database offers unparalleled access to over 2 million health care decision makers, with numerous seg-



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"I am proud of the culture we have instilled at Olson Research," says Lynn. "We take care of our team members and they in turn take care of our clients. What we started 23 years ago is continuing to thrive today and our future is bright."

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Custom consumer research specialist

KATIE SIMMERMON, PRESIDENT, SMARI

Katie Simmermon is president of SMARI, an Indianapolis-based full-service market research firm that specializes in custom consumer research, primarily in health care, retail and manufacturing. Over 35 years, projects have included methodologies ranging from B2B decision maker journeys to 360-degree brand audits and product concept tests.

Katie's background is in analytics and account management in the research and consulting industry.

Katie started at SMARI as an intern and, while not planned, stayed with the company over three locations and several decades.

Now, Katie has worked to transform a 35-year-old company to meet the challenges of an emerging marketplace powered by multi-generational employees and fast-paced technological changes. Attracting the Millennial researcher has been a focus and has produced unique moments for the company like working with monthly subscription services to refine consumer dashboards, performing numerous market assessments for digital-native products and publishing the Millennials and the Modern Buyer e-book in partnership with Indianapolis-based agency Element Three. Under Katie's leadership, the culture of SMARI transformed and the firm was named Indiana's No. 2 Best Place to Work by the Indiana Chamber of Commerce in 2017.

Katie enjoys serving the community and currently supports Ball State University as a board member for the MBA program and sits on the board of directors for the Indianapolis War Memorials Foundation.

But don't let the professional appearance fool you. Katie is a rancher and lives on a 60-acre cattle ranch that she and her husband personally maintain. This hidden life is a constant adventure ranging from bottle-feeding a calf in stiletto heels on the way out to work to using vacation days to attend a cattle auction somewhere in middle America. The attempt at work-life balance in its truest form!

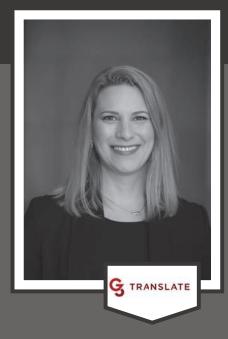
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Nancy's passion for language, innovation and giving a global voice to clients has led her to a career in the translation industry spanning nearly 20 years. She takes special pride in G3's success in the MR field, where the company has partnered on over 15,000 study translations for clients, spanning 135 countries. She also holds a Professional Researcher Certification from the Insights Association, serves on their Southwest board PPAC and is the incoming president of the Greater New York chapter of the Insights Association.

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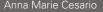
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Contact Jennifer Vahalik for more information at info@theuandigroup.com or send an e-mail to jennifer.vahalik@theuandigroup. com. U&I's Web site is: www. theuandigroup.com.



Making a difference through research

DEBBIE BALCH, FOUNDER AND CEO, ELEVATED INSIGHTS

Debbie leads a thriving team of qualitative and quantitative strategists at Elevated Insights, a full-service insights agency based in Colorado Springs. Despite over 25 years of con-



ducting strategic marketing research as both a supplier and client (P&G, PepsiCo), each year brings new opportunities to grow as a researcher and make a difference in consumers' lives. In addition to varied, strategic B2C and B2B research efforts, Debbie and team use their research skills to give back. Last year, the Elevated Insights team helped the City of Colorado Springs understand the burgeoning panhandler population and how to best meet their needs. The company also launched AskCOSTM in 2017, an annual study tracking resident satisfaction, priorities, substance use, spending habits and desires.

Debbie continually challenges the team to create authentic connections with consumers and use engaging methods to deliver deep insights and inspire smart action. This way, every study can make a difference and improve lives.

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TANYA MINGIONE, PRESIDENT, PINNACLE RESEARCH GROUP LLC

Tanya Mingione is president of Pinnacle Research Group LLC. She has over 20 years of research accomplishments ranging from developing and testing winning communications



strategies for leading advertising agencies to formulating and directing strategic research studies for the world's foremost pharmaceutical corporations. Tanya is a seasoned psychological researcher with a proven track record of identifying motivations, percep-

tions and attitudes and turning those findings into actionability. She is an insightful interviewer, writer and editor. Prior to returning to the Midwest in 1997 and starting Pinnacle Research Group in 2002, Tanya managed a leading market research firm on the East Coast for more than 10 years.

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Five years ago, when Jacqueline Rosales was faced with the enormous task of building a start-up from scratch, she decided to start with an aspect of company-building that many leaders don't tackle at all: She wrote the company ethos. Known as the Telltale Ten, these are the 10 guiding principles that became the basis for the establishment and rapid growth of SoapBoxSample.

"I realized the first step was really to focus on what type of company I wanted to build. That's what I was most excited about. You can be smart, skilled and experienced but if you are not willing, able and genuinely pumped about working for a company that embodies these 10 principles, then I am sorry (not really), you can't play with us," says Jacqueline.

Flash-forward to today, Soap-BoxSample has 45 full-time employees. They've expanded their product offerings to include a full-service division, passive metering and mobile missions and have integrated the operations of icanmakeitbetter, an Insight Community Platform.

Jacqueline attributes the company's success to her staff, while her staff says it's her authentic leadership style. "If you hire the right people, you can overcome any obstacle. They drive growth and success. My goal is to charm them enough that they want to become integral parts of a greater whole."

In 2015, Jacqueline began docu-

menting her entrepreneurial journey – both in and out of the office – in her blog, The Telltale Ten. Popular posts include No Budget Isn't an Excuse for No Brains, So You Want to Be the Boss? and Yay, My Kid is Not a Jerk.

You Don't Know What You Don't Know. Brands need insights that lead to great ideas. SoapBoxSample helps you turn your business questions into actionable insights. Our team of super likable humans combines decades of research experience with a nimble and disruptive start-up mind-set. We believe in making your life easier, saying no even when you don't want to hear it and giving you a research experience that improves your business' bottom line. Offering a FRESH blend of research and technology, our suite of services includes: community insight platform (icmib); mobile and app-based research; passive metering; online data collection; and full-service design and analytics.

www.soapboxsample.com jrosales@soapboxsample.com 818-528-5296



Expert in choice analytics

MEGAN PEITZ, INGENUITY AMBASSADOR, SAWTOOTH SOFTWARE

A self-proclaimed nerd with her master's in mathematics and statistics, Megan Peitz has challenged stereotypes as the ingenuity ambassador at Sawtooth Software, the global leader in



tools and training for choice analytics.

"I've admired Sawtooth Software since my early days of marketing research. When I had the opportunity to meet Bryan Orme, president of Sawtooth Software and Parlin award winner, I couldn't pass up the chance to ask him for a job," says Megan.

"And we weren't even hiring!" says Orme. "But she possessed that rare balance of quant and people skills, which was exactly what we needed."

Megan shares her love of choice analytics by hosting Sawtooth Software's free Webinar series, teaching at choice modeling workshops and presenting at industry conferences. She also mentors female students and was recently the keynote speaker at a high school STEM night.

Sawtooth Software provides sophisticated analytic tools for uncovering consumer preferences in an easy-to-use survey platform. For more information, visit sawtoothsoftware.com.

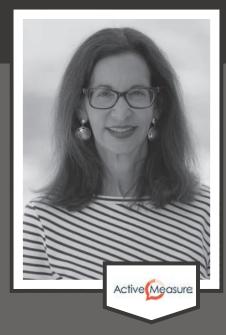
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Leading data collection company

BONNIE BRESLAUER, CHIEF CUSTOMER OFFICER, ACTIVE MEASURE

Bonnie is chief customer officer at Active Measure, a leading data collection company that is setting the highest standard for data quality. Active Measure was built on the premise that people, when properly engaged, will share time,



opinions and data to better their world. Active Measure provides first-party data at massive scale to insights professionals, researchers and marketers through its proprietary research panel.

Bonnie is building on Active Measure's customer-driven growth and is

sharing its profound message throughout the research and insights community. She thrives on working with clients to help them achieve their objectives and mentoring staff for their career development.

Bonnie has 25+ years of experience in the market research industry. She has a passion for data quality and is evangelizing its importance throughout the industry. She is actively involved in industry associations and is a frequent speaker at conferences. Bonnie is a founding member of SampleCon and is on the steering committee for the Coalition for Advancing Sampling, a newly formed group that includes a cross-section of leaders representing corporate buyers, such as P&G and Walmart, MR agencies and suppliers to drive data quality.

www.activemeasure.com contact@activemeasure.com 818-287-7633



Female-driven insights consultancy

KATRINA NOELLE, PRESIDENT, KNOW RESEARCH

Know Research is a full-service, female-driven qualitative insights consultancy on the front lines of research. Our senior-level team of boots-on-the-ground investigators deliver valuable insights to our clients with emphasis on our expertise in the financial services



and retail industries and lifestyle brands.

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keeping our clients In the KNow.

Katrina Noelle, president, is proud to have made KNow Research one of the newest, certified members of the Women's Business Enterprise National Council to further our commitment to women in the research community and beyond it.

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Smart with heart

JENNIFER AIREY: PARTNER
BETH FORBES: PARTNER, CXO
AMANDA MCCOLL: SR. DIR., DATA
SHIREEN OLSEN: SR. DIR., FIELD

Since our 2009 founding, a core group of women with a two-decade history together helped form and grow this strategic consultancy. They are all part



of the core leadership team that helps guarantee excellence to our clients.

Jennifer Airey and Beth Forbes helped found the company. Jennifer focuses on client management and putting research to work in effective client strategies.

Beth is our chief experience officer, responsible for designing an endto-end experience that expresses our company's mission, capitalizes on the strength of each unique employee and results in delighted clients.

Amanda is relentless in ensuring data quality, accuracy and rigor for our

client service teams. She was named an "ambassador of excellence" in 2017.

Shireen's creativity and resourcefulness ensure our innovative methods stay ahead of client needs and our fieldwork meets the highest standards.

At Heart+Mind Strategies, we can proudly say that 68 percent of our employees are women. Jennifer, Beth, Amanda and Shireen represent everyone as smart, savvy women leading us into the future.

jairey@heartandmindstrategies.com www.heartandmindstrategies.com 201-670-8261



Industry icon

ANGELA LORINCHAK, PRESIDENT, JACKSON ADEPT RESEARCH

Women have long been the backbone of our industry and Angela Lorinchak, CEO of Jackson Adept is no exception. Angela has been a leader in our profession for half her life, dedicating countless hours in her desire to strengthen our industry and hone her skills.

In addition to serving on the national board for the Insights Association, she's also owned her own business, served on multiple boards and mentored young market researchers.

Angela started her career on the front lines at Metro Research, ultimately purchasing, expanding and divesting herself of it just in time to tackle her next challenge – Jackson Adept.

Adept Consumer Testing had been an icon in the industry for over 25 years when Jackson Associates (Atlanta) acquired it in 2015. Since then, Angela has used her time management and leadership skills to return it to greatness. She and her team of experienced professionals host dozens of studies each month in their two LA facilities.

Adept's Beverly Hills office, conveniently nestled in the heart of the city, offers six focus suites and the latest technology available, including HD recording, in-house streaming and Jackson's proprietary Instant Access system. The Encino office boasts four focus rooms, each



capable of seating up to 20 clients.
Between these 10 suites and the eight in Atlanta, Jackson covers clients from coast to coast.

Jackson's bi-coastal teams conduct hundreds of qualitative and quantitative research projects each year ranging from focus groups, mock trials and usability tests to taste tests and in-depth interviews.

The company believes "the facility experience starts at the airport," so personal car service is available upon request and cuisine exemplary

enough to be served at the finest restaurants is commonplace in our offices.

Angela Lorinchak is now an icon in the industry in her own right and the Jackson family the better for having her on the team.

alorinchak@adeptresearch.com 310-279-4600 x3202



Provides actionable research results

BJ GERJES, DIRECTOR OF DATA, **CREATIVE CONSUMER RESEARCH**

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m E}$ stablished in 1976 with approximately 80,000 public and private sector projects completed, Creative Consumer Research (CCR) is one of the most trusted market research firms in the U.S.

CCR specializes in health care,



public utilities, public transportation, travel/leisure, entertainment, gambling, financial services, restaurant and food service, residential/commercial property development and retail. A comprehensive line of Spanish-language services is available.

CCR offers a full range of qualitative and quantitative research methodologies: focus group, one-on-one, telephone, intercepts, executive, doorto-door, regular mail, e-survey, Internet, mock jury and product testing.

A 20-year CCR veteran, BJ Gerjes is director of data and works to provide her clients valid and actionable research results. BI believes in maintaining the high standards of data for the integrity of her 800 projects per year.

She serves as the immediate past president of the American Marketing Association Houston Chapter and as a board member of the Damon Independent School District.

BJ holds a bachelor of business administration from the University of Houston.

bgerjes@ccrsurveys.com 281-240-9646



Experienced market researcher

MICHELLE FINZEL, PRESIDENT, MARYLAND MARKETING SOURCE INC.

ichelle Finzel was eight years old the first time she said, "Thank you for calling Maryland Marketing Source. How may I help you?"

When her mother, Barbara Bridge,



founded Maryland Marketing Source Inc. in 1986, Michelle had no idea she'd be growing up alongside the market research industry. However, doing so has provided her with a unique perspective of the industry's development and the

nuanced roles we all play.

As president of Maryland Marketing Source Inc., Michelle's overall goals are to blend theory with practice, emotions with insights and numbers with words. Experienced with qualitative and quantitative research methodologies, she has been published several times and has presented at several industry- and communications-focused conferences.

Michelle currently serves as chair of the field committee for the Oualitative Research Consultants Association, has served on the board of the Baltimore chapter of the American Marketing Association and is a member of the Insights Association.

www.mdmarketingsource.com mfinzel@mdmarketingsource.com 410-922-6600



Women of insight: MFour's senior research consultants

RESEARCH

ANDREA HAN, JOAN MARTINEZ AND ALLYSON WEHN

Andrea Han, Joan Martinez and Allyson Wehn come from widely diverse hometowns – Sao Paulo, Brazil; the village of Ordot on Guam; and Fullerton, Calif., respectively – to share a proud and important job title at MFour: senior research consultant. They also share a passion for consumer

insights that, among them, has produced 57 years of experience in market research. As a team, they analyze data obtained from validated first-party consumers who participate in research by using MFour's pioneering mobile app Surveys on the Go®. That includes drawing insights from location tracking data, photo captures and real-time "video selfies" that respondents create and submit with their phones.

"My natural curiosity has driven my career," says Martinez, who has been doing consumer research since her college days at California State University, Los Angeles. "What intrigues me about MFour is the technology. My thinking was, 'This is the new frontier, where the world is going.' I want to be part of that."

For Wehn, "Sometimes I feel like a detective because clients are asking me to look for answers." The University of California, Santa Barbara graduate also relishes the populist underpinnings of consumer research. When she's out shopping, she often finds herself mentally recreating the research behind the merchandise. "When I see the real-life applications, more often than not those decisions come from consumers giving feedback on how they want things to be."

Han, a graduate of the University of Southern California, says her career satisfaction is tied to her clients' satisfaction. "They want to know, 'What does this data mean to us?' That's what we're here for. The real rewarding part for me is when clients look at the insights in the deck and say, 'This is what we needed... and more.'"

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Woman-owned firm specializing in full-service research

AMY GORELKIN, CEO, BETA RESEARCH CORPORATION

Amy takes a very hands-on approach to her role as CEO. She maintains a keen awareness of each project that comes in and its progress toward dead-



line. She also pitches in where needed, regularly coding, interpreting response numbers and proofreading reports to ensure that clients get what they need when they need it.

One of Amy's key responsibilities is maintaining Beta's family sensibil-

ity, cultivating easy, collegial relationships throughout the company and ensuring that clients receive prompt, personal attention.

Amy first started working at Beta in 1995. At the direction of the company Founder – her late father – Jerry Kossoff, Amy learned every aspect of the business from the ground up.

Beta Research is a family-owned, full-service marketing research firm that utilizes quantitative and qualitative techniques to obtain key decision-making information for its clients. Beta Research is a certified womanowned business with a demonstrated commitment to sustainability and social responsibility.

www.betaresearch.com info@betaresearch.com 516-935-3800



Scientific and business acumen

BEVERLEY KROLL, CHAIRMAN OF THE BOARD, P&K RESEARCH

Beverley Kroll co-founded Peryam & Kroll Research in 1957 and served as P&K's president and CEO until assuming her current position as chairman of the board of directors. Bev is among the marketing



research industry's most successful businesswomen and her scientific and business acumen have established P&rK Research as a leading provider of sensory and consumer research to the world's largest CPG

companies. In 1995, Bev founded the David Peryam Award, in honor of her late business partner, which recognizes individuals for contributions to sensory and consumer science. In addition to P&K's board responsibilities, which she shares with her sons Jeffrey and Dan, Bev remains active on the board of philanthropic organizations, such as the Chicago Lighthouse for the Blind, the Chicago North Suburban Healthcare Foundation and National Louis University. Bev still finds plenty of time to spend with her family, including seven grandchildren and her beloved pup Molly.

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Critical Mix

Founded 2011 | 200+ employees Hugh Davis and Keith Price, Co-CEOs



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Toluna

Toluna

Founded 2000 | 1,000+/- employees Frederic-Charles Petit, CEO

Toluna provides consumer insights designed to empower success in today's on-demand, global economy. Powered by the perfect fusion of technology, expertise and the largest global



community of influencers at the ready, Toluna delivers rich, reliable, real-time insights to individuals and companies of all sizes. Toluna offers leading omnibus solutions powered by the company's automated insights platform. Clients can ask up to 30 questions and receive answers in minutes, on demand, in real-time, globally. Our automated consumer insights platform, TolunaInsights™ underpins everything we do. Clients can access the platform directly, leverage Toluna's managed services or create fully customized digital consumer insights programs via our engineered services.

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Wakefield Research

Founded 2008 | 50 employees Paul Bragan and Nathan Richter, Managing **Partners**



Wakefield Research (www.wakefieldresearch.com) is a leading provider of quantitative, qualitative and hybrid market research and market intelligence. Wakefield Research supports the world's most prominent brands and agencies, including 50 of the Fortune 100, in 70 countries. Our work regularly appears in top-tier media. Our staff includes classically-trained market researchers and professionals from the worlds of marketing, public relations and media. Though we offer dozens of capabilities, our omnibus is one of our most popular offerings. With no question minimums, fast turnaround times and professional, full-service consulting on questionnaires and analysis, we have one of the most user-friendly omnibus services available.

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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.orq.

Insights Association
Southwest Chapter will hold its educational forum on
August 9-10 in Plano, Texas.
Visit bit.ly/2MEBzF8.

IQPC will hold its Customer Contact Week Executive Exchange on **August 12-14** in **Chicago**. Visit bit.ly/2rU8XyJ.

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.

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

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.

Intellus Worldwide will hold the Intellus Worldwide Institute 2018 on October 1-2 in Quincy, Mass. Visit bit.ly/2L1dESW.

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/2dx0cB8.

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.orq.

Research & Results will hold its 2018 trade show on October 24-25 at the MOC Convention Center in Munich. Visit bit.ly/2FA086I.

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.

CX Talks: The Customer
Experience Summit Atlanta
2018 will be held on October 29
at CitySprings Center in Sandy
Springs, Ga. Visit cxtalks.org.

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.

IQPC will hold its Customer Contact Week Executive Exchange on December 2-4 at the Hotel Colonnade in Coral Gables, Fla. Visit bit. ly/2J8J980.

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



Names of Note

In Memoriam...

- Ron Clark, founder and senior partner of Restaurant Research Associates, Tustin, Calif., died June 7. He founded IHR Research Group in 1976. Originally located in Orange County, Calif., IHR's data collection and programming operations were moved to Las Vegas to take advantage of the market's skilled labor force. Clark also served in numerous marketing research and marketing positions in New York, Chicago, Detroit and San Francisco.
- Yamaha Corporation of America, Buena Park, Calif., has named Matt Searfus as vice president of marketing, a newly created position.
- Logistics company UPS, Atlanta, has appointed Kevin Warren as chief marketing officer.
- New Orleansbased sample-buying platform Lucid has hired Martino Roselli as its new SVP of customer experience in the Americas.



Roselli

■ Mumbai-based research firm MRSS India announced three hires, adding Mridula Savitri Mishra as research director, social research practices;



www.quirks.comarticles/2018/20180813.aspx

Geeta Sachar as senior vice president, MRSS India (head south region); and Ruma Sengupta as senior vice president.

- Audience data firm Eyeota has tapped Elissa Reiling as vice president, marketing, to lead its global marketing and communications initiatives. She is based out of the New York office.
- Research firm GBH Insights has appointed Javier Flaim and Jeremy **Korst** to its advisory board. Flaim most recently served as CEO of clean technology platform Recyclebank and Korst is a technology executive who has held roles at Microsoft and T-Mobile.
- Jannet Torres has joined Burbank, Calif.. research firm ThinkNow in the newly created position of vice president, custom research. She will have national responsibility for



building the firm's research and consumer insights team and will be based in Los Altos. Calif.

- New Hope, Pa., research firm RG+A has added four new team members. Kim Kurtin has joined as a vice president for client development. Julie DiPopolo has been named associate methodologist in the company's marketing sciences group. Robert (RJ) Bell has joined the firm's client service group as a consultant. And RG+A has expanded its presence to the West Coast with the rehiring of Ali Spiro as a principal within the client service group. Spiro will be based in the greater Los Angeles area.
- Research firm GfK has named Rolfe Swinton as its first director of data as-

sets in North America.

- Alyssa Wright has joined Johnson City, Tenn.-based research firm Smarty Pants as media maven. She is based in Myrtle Beach, S.C., where she is completing her MBA at Coastal Carolina University.
- Insights firm Kelton Global has named Nicole **Brandell** to its leadership team as partner, brand and marketing strategy.



■ Researcher Lightspeed has promoted Jeff Tsui to managing director, Greater China.

- Hulu has expanded its marketing executive ranks, adding Ryan Crosby as VP of content marketing and Nick Tran as VP of brand and culture marketing.
- San Francisco-based research technology platform AYTM (Ask Your Target Market) has named Kandice Coltrain as vice president of business development.
- Online panel company Netquest has appointed Laura Casparrini as country manager for Italy.

■ SMG Insight,

a London-based sports and entertainment research

company powered by YouGov, has appointed Ned Morris as managing director of its newest international office in Melbourne, Australia.

■ Martin Sorrell, founder and former CEO of advertising company WPP, will

take over as executive chairman of shell company Derriston Capital, where Sorrell said he would invest £40 million (\$53 million) of his own money, with institutional investors having pledged £150 million to buy marketing companies. Derriston Capital will be renamed S4 Capital, a Sorrell entity. Sorrell stepped down from WPP in April following an investigation into an allegation of personal misconduct.

- U.K.-based video technology company Voxpopme has promoted Tom Williams to chief revenue officer.
- Katie McDonnell has joined Burke Healthcare, Cincinnati, as senior account executive in client services.
- Sweden-based researcher Nepa has added two new members to its board: Annika Steiber, a management innovation professional; and Jan Carlzon, former CEO of Scandinavian Airlines.
- SampleCon, an industry conference and community for market research sampling, has named two to its board of directors: Sima Vasa. chief evangelist officer and founder of Paradigm Sample, as chairman; and Rob Berger, managing director of Maru/Blue, as vice chair. Vasa succeeds Patrick Comer. CEO and founder of Lucid. Additional Sample-Con board directors for 2018/19 include Cint, Ipsos, Lucid and ProdegeMR.





Berger

■ U.K.-based customer science company dunnhumby is increasing its staff by 25 percent to support growth and demand. The firm has hired four new members to its leadership team: Gianluca Carrera, chief solutions officer; David Jack, chief technology and product officer; Mike **Pittman**, chief information security officer; and Denise Sefton, chief people officer. David Parry has joined as global

head of marketing and Tom Block has joined as global head of retail pharmacy. The company has also made a number of other regional and sector appointments.

- Robert Ferguson, managing director of research and consulting firm Strategic Consulting Inc. (SCI), Baltimore, will assume the position of president of the firm. Ferguson succeeds **Thomas** Weschler, who founded the company in 1996. Weschler will remain with SCI in an advisory capacity and continue to support research and management consulting projects.
- Stamford, Conn., text analytics firm OdinText Inc. has appointed Andy Greenawalt as CEO. OdinText Founder and current CEO Tom H.C. Anderson will transition to the roles of chief research officer and chairman.
- Mumbai researcher MRSS India has appointed Retassh Bhansali as its global CFO.
- Martec Research Center, a research facility located in 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, celebrated 15 years with Martec Research Center in July.
- Nancy Hernon, CEO of New Yorkbased translation company G3 Translate, has been accepted into the Forbes New York Business Council, a growth and networking organization for small business owners in Greater New York City.
- Auckland, New Zealand, research solutions firm Infotools has appointed **Horst Feldhaeuser** as group services director to lead the company's newlyintegrated global services division. Additionally, Patricio Pagani, one of the company's former executive directors, has stepped down to pursue his interest in artificial intelligence in an academic setting. He will continue to serve on the Infotools board as an independent director and shareholder.
- Mellissa Hill has joined Torontobased data services firm Maru/Blue as director, strategy and development.

- Julie Paul has joined as chief operations officer, a newly created role. Paul will be based out of Vancouver.
- Consumer neuroscience platform MindProber has announced its advisory board as it prepares to enter the U.K. and U.S. markets: Dan Foreman, who will combine his advisory position with a seat on the board of directors; AJ **Johnson**, executive director at Kynetec; **Joaquim Bretcha**, an economist from the Universitat Autònoma de Barcelona; António Gomes, a managing director at GfK; and Paulo Santos, an investor and business advisor.
- In Detroit, researcher Ipsos has appointed **David Letson** as executive vice president of Ipsos RDA. Letson will lead the development and execution for the automotive quality advisory services team.
- Amy Charles, senior vice president of Ipsos Loyalty in Canada, has been elected board chair of The Marketing Research and Intelligence Association, a two-year role.
- Retail consumer insights firm SPINS, Chicago, has named Rosemary Haefner as chief people officer.
- Steven Krull has joined research consultancy Greenberg Strategy, Emeryville, Calif., as a VP of strategic planning.
- New York-based research technology company Remesh has appointed Anthony **Caputo** as vice president of people science.
- **Jay Thordarson** has been appointed chief operating officer of Canada-based company CRC Research Inc. Thordarson will be responsible for combining the facility and recruiting operations of Research House, Head Quarters and Consumer Vision, all companies recently acquired and consolidated under the CRC banner.
- Emotion measurement AI company Canvs, New York, has added Kristin Luck, marketing measurement professional and co-founder of Online Testing Exchange, to its board of advisors, dubbed the Emotion Currency Council.
- U.K. mobile research platform One-Pulse has appointed Guy Oliver as enterprise sales director and Mark Bridgens as product development manager.

Research Industry News

News notes

- Nashville, Tenn., company 20|20
 Research has been awarded the U.S.
 Patent 9,990,418 for establishing a system and method for creating an opinion and behavioral data economy. Using block-chain technology to create a consumerled exchange for market research, the platform provides a method for creating an anonymous and public marketplace for trading and monetizing behavioral and opinion data. The approach decentralizes the current market research survey value chain and redistributes the balance of power and control back to the consumers and the brands.
- Marketing insights firm **Phoenix Marketing International**, Rhinebeck,
 N.Y., has attained the ISO/IEC 27001:2013
 certification, the international standard
 for information security management.

Acquisitions/transactions

- Customer data science company dunnhumby, London, has acquired Aptaris Software, a marketing and promotions management company, for an undisclosed amount.
- Calif.-based **Hero Digital** has acquired **MaassMedia**, a Philadelphia-based analytics firm. Financial details were not disclosed but Hero Digital CEO David Kilimnik said all 15 staffers from MaassMedia, along with its leadership team, will remain in place.

www.quirks.com/articles/2018/20180814.aspx

- CX platform **InMoment** announced an expansion into Australia and New Zealand with the acquisition of boutique customer experience agency **brandXP** and appointment of a local CX team. The company has chosen Melbourne as its fifth international base and will also have a New Zealand office as part of this expansion. With the acquisition of brandXP, InMoment will now have direct points of sales, marketing, services and support. InMoment's efforts in Asia-Pacific will be led by Claire Fastier, VP of APAC.
- New York-based research and analytics firm M Science has acquired data mapping company TickerTags Inc.

 TickerTags maps and monitors tangible and intangible business drivers that influence companies and markets and converts real-time conversation activity into data for investment analysis. TickerTags will be available as a standalone product and its data will be incorporated into M Science's research offering M Analysis.

 M Science analyst Mark Bachman will serve as head of TickerTags.
- Canada-based research firm **Leger** has acquired the yconic panel, a panel of 1 million Millennial and Generation Z respondents from the **yconic** firm in Toronto. The panel will be integrated into Legerweb, Leger's Web panel division. Separately, Leger has acquired the Relative Happiness Index (RHI) and the Workplace Happiness Index (WHI), founded and created by Pierre Côté. The indexes allow citizens in Canada and France to measure happiness in their lives and at work. Leger aims to pursue the development of the acquisitions and promote them in the United States. Côté will join Leger as research director and remains an RHI and WHI partner.
- San Francisco-based online survey software firm **QuestionPro** has acquired workforce technology and analytics firm **WorkXO**.
- Westport, Conn., research company **Critical Mix** has acquired **UBMobile**, a

- consumer insights technology and services company. The acquisition will augment Critical Mix's collaborative insights solutions by leveraging UBMobile's proprietary technologies and methodologies.
- Toronto-based data services firm Maru/Blue has acquired Tú Cuentas, a Hispanic research panel targeting Spanish-speaking communities in the U.S.

Alliances/strategic partnerships

- Alpharetta, Ga., sampling solutions firm **P2Sample** and New Orleans-based data technology company **Lucid** have enhanced their partnership to include real-time tacking of P2Sample's survey respondent experience. The newly-developed feature allows Lucid to see the conversion rate, financial performance, response count and overall health of studies, providing an improved respondent experience and a streamlined business relationship between the two firms.
- Minneapolis-based marketing technology firm **Equals 3** has formed a partnership with New York-based marketing insights firm **GBH Insights**. The partnership will expand on the data sources that can be integrated into Equals 3's cognitive assistant, Lucy. Agencies and marketers using Lucy can integrate data from their proprietary GBH custom surveys and data analytics initiatives with other Lucy-accessible data such as research from partners like eMarketer, Dow Jones and the AMA.
- Research Now SSI has formed a partnership with Catalist, a voter data company. Catalist's behavioral and modeled variables, paired with Research Now SSI's first-party data and multi-mode survey capabilities, enhances voter segments and enables pollsters, PACs, public opinion groups and nonprofits to conduct political polling of panel members across modes via online and CATI.
- In Tokyo, IT and network technologies firm **NEC Corporation** and research company **Macromill** have launched a data utilization collaboration that uses artifi-

cial intelligence to help companies execute marketing activities. The companies began jointly developing marketing solutions in April and are aiming to launch services in 2019. So far, the companies have developed demonstration experiments that focus on expanding consumer data and analyzing consumer preferences.

- Oslo, Norway, research technology firm **Confirmit** has formed a partnership with fraud protection company **Imperium** to help prevent duplicate entries or fraudulent survey participants to protect data integrity. Imperium's technology, used with Confirmit's solutions, will allow companies to improve survey response rates, prevent automated participants or bots from completing surveys and reduce the effort spent on data cleaning.
- Chicago-based researcher IRI has formed partnerships with SPINS, PlaceIQ and Geoscape to develop and deploy new audience solutions for IRI Verified Audiences. The partnerships combine IRI's purchase-based audiences with SPINS' health-attribute data, PlaceIQ's location data and Geoscape's multicultural demographic data. Three new IRI Verified Audiences solutions have been enabled through the partnerships: IRI and SPINS Health and Wellness Verified Audiences; IRI Location-Based Verified Audiences; and IRI ProScores and Geoscape Acculturation Audiences and IRI Verified and Geoscape Acculturation Audiences.

Association/organization news

- Amy Charles, senior vice president of Ipsos Loyalty in Canada, has been elected board chair of The Marketing Research and Intelligence Association, a two-year role.
- The IAB Technology Laboratory, a non-profit research and development consortium for the global digital media industry, has released its Data Transparency Framework I.o for public comment. It outlines sourcing disclosures for those collecting data used to target, personalize and measure digital advertising. The proposal will introduce ID-level transparency into a largely opaque marketplace where data segment composition is difficult to evaluate and collection and usage practices are increasingly scrutinized via legislation such as the EU's General Data Protection Regulation. The Framework in-

cludes: a new set of minimum disclosure requirements for data sellers; an open API to structure and communicate information among supply-chain participants and ease implementation requirements; and supporting compliance programs.

- The Marketing Research and Intelligence Association (MRIA), Toronto, has amended its Member Code of Conduct with new requirements and penalties for members and their firms who release results into the public domain. While the change is intended to bring more transparency for results released by members on any subject matter, it will especially apply to those who issue opinion polls during election periods. The new rules will apply to all survey research firms and the MRIA is launching a new Web page that features compliant member firms that regularly release results with a click-through to their sites.
- Representatives from the **Insights As**sociation and other industry associations are updating the **Certification Institute** for Research Quality's (CIRQ) ISO standards. The CIRQ is an ISO audit and certification body and subsidiary of the Insights Association. The associations are finalizing an update of ISO 20252 (Market, Opinion and Social Research), combining it with ISO 26362 (Access Panel Standard) and ISO 19731 (Digital Analytics and Web Analyses) into a more comprehensive global standard. The newly-revised ISO 20252 standard is expected to launch officially later this year. The CIRQ has also appointed the following to its board of directors: Craig Overpeck, CEO, Bioinformatics Inc. as chair; Michael Brereton, executive in residence for the Department of Marketing at Michigan State University - The Eli Broad College of Business; and Kevin Kish, senior associate at Schellman & Company LLC. Juliana Wood, who has been managing CIRQ as director of certifications and training at the Insights Association, will now also serve as managing director of CIRQ.
- The Insights Association and the A to Z Communications Coalition have jointly filed comments with the Federal Communications Commission (FCC) following a recent DC Circuit Court decision rejecting the FCC's 2015 Telephone Consumer Protection Act (TCPA) rules. The commenters say the FCC should adopt an autodialer definition "that adheres to

the language and intended purpose of the TCPA." They also support the creation of a database of reassigned cell phone numbers and an examination of what information is reported to the database to reduce false negatives and false positives.

■ Nonprofit organization **Women in Research** (WIRe), Los Angeles, is accepting donations to fund its third scholarship through its Global Scholarship Fund, in partnership with the **ESOMAR Foundation**. The scholarship, this year in Guatemala, supports female students pursuing degrees in research-related fields around the world. All funds raised are matched dollar-for-dollar by Unilever.

Awards/rankings

- The *Cincinnati Enquirer* has recognized research company **Ipsos** as one of Cincinnati's Best Workplaces in 2018. The ranking is based on surveys about the workplace completed by each company's employees.
- This year's winners of the Ginny Valentine Badge of Courage Awards have been named. The award recognizes those who show determination to produce great market research. The winners include: Anije Lambert, PDC Research, for her research in Guyana; Kristof Varga, Bakamo Social, for switching from politics to research to make a difference; Baileigh Allen, Zigzag Research USA, for challenging views on autism; and Poli Paterson (Limbpower) and Francis Cowen (DSA) for making the voices of disabled people heard.

New accounts/projects

- In addition to technology platform **Delvinia** offering **Voxpopme** video insights in the Canadian market through its AskingCanadians panel, Delvinia will also offer Voxpopme video insights in North America through its **Methodify** research automation platform.
- Baltic-region airline **airBaltic** has selected Dublin-based CX software firm **Boxever** to support its efforts to connect customer and operational data to deliver predictive offers on every channel.
- Research company MRSS India has announced that a 40-day survey team training under the Longitudinal Ageing Study in India for the states of Meghalaya and Sikkim was inaugurated in Shillong, India, on May 23. The study is being

conducted in the two Northeast states by MRSS and will be conducted over the next 25 years. MRSS will pursue coverage of the remaining Northeast markets in the coming years. The company has opened a regional office in Shillong to cater to the research needs of the Northeast region.

■ Independent schools group Cognita has implemented a dedicated voice of the student program across its 69 schools using the Confirmit Horizons platform by Oslo, Norway, research solutions company Confirmit. The program has been implemented across all Cognita schools in Europe, Latin America and Southeast Asia. Using Confirmit Horizons to run the program, Cognita can gather feedback about how safe and secure students feel in each environment. Confirmit Active Dashboards is used to share insight with head teachers, safeguarding advisors and education directors.

New companies/new divisions/ relocations/expansions

- SIS International Research has renovated its New York City focus group facility, enhancing its qualitative and product testing capabilities. The facility received new floors, furniture, IT upgrades, client observation room upgrades and has a kitchen for food testing. The company also announced growth in its consumer and B2B recruitment databases in New York, New Jersey and Connecticut.
- Tokyo-based research and online panel company **Rakuten AIP** has opened an office in Taiwan.
- Directions Research, Cincinnati, announced a strategic reorganization and has formed a dedicated technology solutions group that will manage all aspects of data flow. The new group will be co-led by Phillip Thrash, senior vice president, head of technology; Jim Linz, vice president, business intelligence and technology; and Mike Herrel, director of development.
- GenZee Media, an agency associated with e-commerce retailer OCM.com, has launched. GenZee Media aims to help marketers reach the Generation Z demographic at the point in their consumer journey where they are leaving home and entering college. Andrew McDade, current president of OCM, will serve as head of the new agency.

- The Cross-Tab Group has restructured two of its three companies Blueocean Market Intelligence and Cross-Tab and merged them to form a new entity, Course5. Cross-Tab Group's third company, Borderless Access, has been demerged and will operate as an independent entity. Course5 will release a new suite of solutions and services for companies with AI-driven analytics and market research, including Course5 Discovery, which allows decision makers to get answers and insights through a personalized voice and chat assistant available on their smartphones and tablets.
- Roswell, Ga., company MMR Research Associates has launched its new division, experience strategy group MMR LIVE. The division will be located in Roswell in the same building as its parent company and will have a core offering that includes strategic partnerships with several technology companies that provide research solutions.
- Germany-based agricultural research firm **Kleffmann Group** has opened a new office in India.
- Communications services company **WPP** has opened its latest office co-location in New York and has begun moving the first 4,000 of its New York-based people from GroupM and Kantar to the new building.
- Chicago-based sports data and intelligence firm **STATS** has opened a new office in Limerick, Ireland. Gráinne Barry will run the new office as European, Middle Eastern and African regional operations director. The office aims to employ more than 150 full- and part-time staff by 2020.
- Frankfurt, Germany, research and consulting agency **insight europe** has rebranded as **Insight Culture** to reflect its growth beyond Europe.
- New York-based research company **Nielsen** has launched a Neuro Lab in Singapore in partnership with the Singapore Economic Development Board. The lab will use EEG, facial coding and eye-tracking tools to capture consumer emotion, attention and memory activation. The lab will also offer a self-reporting tool for clients to capture the voice of the individual.
- Toronto-based data services firm Maru/ Blue has launched its new qualitative

- community. Members of the community have been pre-screened and are immediately accessible for qualitative research exercises. Access to community is available now in the U.S. and Canada.
- Research technology firm response:now, Dallas, has rebranded as response:AI.
- Eileen Campbell, former global CEO of Millward Brown, and siblings Andrew Reid (founder of Vision Critical) and Jennifer Reid have partnered to create Reid Campbell Group, a new holding company. The newly formed group has launched its first two companies: insight technology company Rival Technologies and full-service research agency Reach3 Insights. Andrew Reid will lead Rival Technologies, while former Ipsos and Vision Critical executive Matt Kleinschmit will lead Reach3 Insights.
- Research company **Kantar** has launched the Kantar Brand Growth Lab in Singapore. The research and development lab, which will focus on advanced analytics, is part of Kantar's three-year collaboration with the Singapore Economic Development Board and will include hiring data scientists and business designers to boost Singapore's workforce.

Research company earnings/financial news

- Cannabis market research firm **BDS**Analytics, Boulder, Colo., has raised
 \$3.5 million in Series B funding led by
 CanopyVentures and Altitude Investment
 Management.
- Auburn Hills, Mich., research firm **Gongos Inc.** reports over 200 percent projected growth in its CX practice over the past year.
- India-based researcher MRSS India has reported a consolidated net profit of INR 136.1 million for the year ended March 31, 2018.
- U.K. research agency **System1** has reported an 18 percent revenue decline for the year (ended March 31) to £26.94 million, compared to £32.80 million reported last year.
- DJS Research, based in the U.K., has recorded an annual turnover of £5.2 million, up from £4.7 million recorded last year.

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BEFORE YOU GO ... Conversations with

corporate researchers



"Not only should segments be identifiably different but each should be of sufficient size that they can be reached and targeted, though not so large that they comprise a relatively heterogeneous group."

10 minutes with...

Steve Michaels

Senior Consumer Researcher, Customer Insights and Measurement, State Farm

You've worked with several global brands. Describe the most rewarding part of working with diverse markets.

I've spent my entire career studying consumers and to have the opportunity to identify cross-cultural differences makes the work particularly rewarding. Seeing how certain South American cold and flu sufferers buy medication by the pill, not by the bottle or box; examining how European and Japanese consumers use writing implements; studying dog owners in Japan and Korea who gravitate toward small breeds ... just a few examples where decisions around product size, packaging and distribution were vital to brand health. It's very rewarding having long-held assumptions about the market place challenged and to help brands grow in ways that look so different from the U.S.

State Farm is commited to volunteerism and community betterment. How does marketing research fit into these programs?

It's a pleasure to work for a company so committed to enhancing communities and neighborhoods. We feel we're making such a difference at a local level. This requires a deep understanding of why folks volunteer, how life stage factors in and the identification of barriers to volunteerism in order for State Farm to develop impactful programs, persuasive messaging and long-standing philanthropic partnerships. My research in this area supports our neighborhoodofgood.com site, which makes it easy for any individual to identify volunteering opportunities in his or her local area.

What is the most challenging part of conducting segmentation research?

There are so many challenges to segmentation, which is why it can really bust a budget.

When designing a segmentation, it's crucial to understand different domains demographic, geographic, needs-based, attitudinal, behavioral, etc. In my experience, focusing on just one of these is limiting. For instance, two business owners spending \$1,500 on insurance might be thought of as behaviorally similar. But researchers must know that a startup that purchases the minimal coverage differs substantially from a mature business that willingly purchases as much coverage as it can afford.

Not only should segments be identifiably different but each should be of sufficient size that they can be reached and targeted, though not so large that they comprise a relatively heterogeneous group.

Finally, getting buy-in from stakeholders is vital for successful segmentation, both in communicating the need up front and in adopting the final proposed segments. Product development, customer service, marketing ... segmentation needs to cycle through all areas of an organization to really be successful, and it needs to be refreshed periodically in an ever-changing marketplace.

Read the full interview at www.quirks.com/articles/2018/20180822.aspx.

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