QUIRK'S

Marketing Research Review

OCTOBER 2011

SPECIAL ANNIVERSARY ISSUE

> Industry veterans look back – and forward – 25 years

> Tom Quirk tells the story of *Quirk's*

> Analyzing two decades of research buying trends

25th

ANNIVERSARY

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QUIRK'S 25th ANNIVERSARY

Using patient profiling to improve the pharma buying process

Also...

> Doctors prescribe pharmaceutical sales tips

> Why line managers don't value CSM programs

> Be careful with the Net Promoter Score

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QSR research On The Go

Triple O's is taking its burger-joint fare to the streets with the launch of Canada's first mobile food truck by a quick-service restaurant (QSR) chain. But that's not all the food truck will do. In addition to serving its menu items, Triple O's On The Go will also function as a mobile research and development center to enable the corporate and franchised-based chain to test out new markets and menu items and generate instant guest feedback and sales data.

"Triple O's On The Go is much more than just a mobile food truck to serve our famous burgers, shakes and fries - it's a complete R&D facility on wheels," said Warren Erhart, president of White Spot Limited and Triple O's. "The mobile restaurant enables us to test out potential new locations and menu items - two of the greatest 'X-factors' of any restaurant organization - before putting a stake in the ground. For a prospective franchisee, having this type of firsthand experiential market research is invaluable."

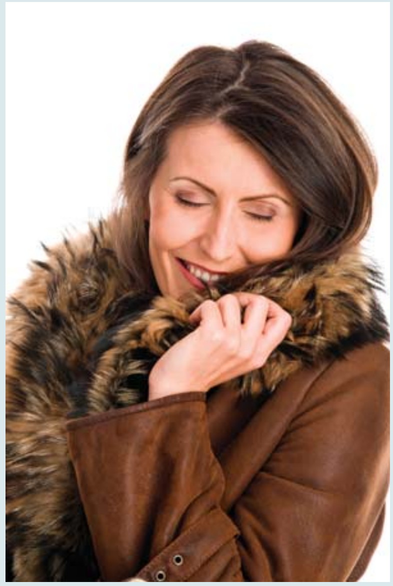
Kid-innovators seek technology that's more intuitive

Kids across the world were asked to draw the answer to this question: What would you like your computer or the Internet to do that it can't do right now? Latitude, a Beverly, Mass., research company, hoped the question would offer a look into possible futures for technology.

More than 200 kid-innovators, ages 12 and under, from Argentina, Australia, Chile, Colombia, Denmark, India, Mexico, The Netherlands, Panama, South Africa, Spain, the U.K. and the U.S., submitted drawings of their imagined technologies. The result? Kids predict that the future of media and technology lies in better integrating digital experiences with real-world places and activities.

The majority of kids (77 percent) imagined technologies with more intuitive modes of input (e.g., verbal, gestural and even telepathic), often capable of human-level responsiveness. One-third of kids invented technologies that would empower them by fostering knowledge or otherwise "adult" skills, such as speaking a different language or learning how to cook.

Several study participants imagined technologies that are just beginning to appear in tech-forward circles, such as Google's revamped image search, which allows users to place images, rather than text, in Google's search box to perform a query.



Some like it furry! The connection between hormones and texture preferences

A woman's hormonal makeup drives her taste in fabrics and textures, according to findings from DervalResearch, Chicago. Depending upon gender, ethnicity and immune system, individuals have different perceptions of light touch, pressure, pain, cold and vibrations.

Estrogen-driven women prefer animal fabrics such as wool, fur, leather or silk, while their testosterone-driven sisters go for vegetal materials such as cotton and linen. Men, on the other hand, are more sensitive than women to synthetic textiles such as nylon.

Between April 2007 and February 2011, the firm studied 3,500 individuals from 25 different countries. Both men and women of various ethnicities, vocations and general preferences were measured for their individual sensitivity to touch and interviewed about which fabrics they preferred and which ones they found irritating to the touch.

Knowing consumers' Hormonal Quotient may make it possible to predict not only their favorite textures but also their preferred flavors, smells, shapes and sounds. Diana Derval of DervalResearch suggests that companies may no longer need to conduct recurrent surveys - they only have to identify the profile and HQ of their consumers once.

Consumers give little attention to ads on mobile devices

Over half of smartphone and tablet users never fully pay attention to ads on their devices when watching full TV episodes and playing games, according to a survey conducted by Prosper Mobile Insights, a division of Worthington, Ohio, research company BIGresearch. Only 13.3 percent regularly pay full attention to advertising while watching TV on their device and 19.2 percent do the same while playing games. Ads found while surfing the Web on a mobile device appear to get the most attention from mobile users (35 percent).

Further, one in 10 mobile users believe advertisements viewed on their smartphone or tablet regularly influence the products or brands they purchase. Another 41 percent say these mobile ads occasionally influence their shopping habits. Nearly half are not influenced by ads viewed on a mobile device.

Consumers appear more likely to seek out the information they need from retailers or brands, as 80.8 percent say they use their smartphone or tablet to look for a product or service. Nearly 80 percent use their mobile devices to locate a store or store hours; 55.7 percent research specific products; and 53.2 percent receive text messages with special offers. One-third uses a mobile device to scan QR codes. For more information visit www.bigresearch.com.

Modern women: With great power comes great … stress?

Women's control over spending decisions, coupled with their gains across the working world and politics, point to women of tomorrow being in a position to exert more influence than ever. Nearly 80 percent of women in developed economies indicated they believe the role of women will change and of those, 90 percent believe it will change for the better, according to New York researcher The Nielsen Company's Women of Tomorrow study.

However, optimistic as they may be, female respondents say they are pressured for time and feel stressed and overworked. Women in emerging countries indicated they feel the pressure even more so than women in developed countries. Women across the world are managing multiple roles but a contributing factor to the higher stress levels in emerging markets is that there is little spare cash remaining after the basic essentials to spend on themselves or take vacations.

Among female respondents in emerging markets, women in India (87 percent), Mexico (74 percent) and Russia (69 percent) said they were most stressed/pressured for time. Among developed countries, women expressed feeling this pressure most in Spain (66 percent), France (65 percent) and Italy (64 percent).

When asked how women expect to allocate additional money they earn or expect to earn over the next five years, differences emerge. More than half (56 percent) of women in emerging countries said they plan to allocate funds for their children's education, contrasted to 16 percent of women in developed countries. Women in Nigeria (85 percent), India (76 percent) and Malaysia (63 percent) gave the most importance to saving for their children's education.

Overall, developed-market women said they plan to spend their extra money on vacations (58 percent), groceries (57 percent) and savings or paying off credit cards/debts (55 percent each), while emerging-market women said they were looking to spend extra money on everyday essentials such as clothing (70 percent), groceries (68 percent) and health and beauty items (53 percent). In emerging markets, vacation ranked seventh among women, with 40 percent indicating they would spend extra money on it.

Across countries surveyed, women believe they have more opportunities than their mothers. Women in emerging markets believe their daughters will have even more opportunities than they did relative to their mothers. However, in developed countries, women surveyed believe their daughters will have the same opportunities, not more.

Less than half (40 percent) of women in developed countries surveyed believe their daughters will have greater financial stability, while 54 percent believe their daughters will have a better education. And 34 percent believe their daughters will be less likely to retire when they choose to compared to today's standards. However, nearly three-quarters of female respondents in developed countries believe their daughters will have better access to technology.

In emerging markets, 80 percent of women surveyed believe their daughters will have greater financial stability; 83 percent believe their daughters will have a better education; and 84 percent believe their daughters will have better access to technology. For more

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names of note

Bob Cohen, former president of *Scarborough Research*, New York, died in July 2011 at age 58.

Gerald Eskin, founder of Chicago research company *Information Resources Inc.*, died in June 2011 at age 76.

Lightspeed Research, Warren, N.J., has promoted **Frank Kelly** to senior vice president, operations.

B2B International, a Manchester, U.K., research company, has named **Julia Cupman** director, North American strategy and operations; and **Oliver Truman** director, IT.

Cupman

Creed

Alex Creed has joined *MMR Strategy Group*, an Encino, Calif., market research consultancy, as vice president, business development.

Victoria, B.C., research company *Terapeak* has promoted **Colin How** to president.

National Research Corporation, Lincoln, Neb., has named **Susan L. Henricks** president and COO.

New York research company *Radius Global* has hired **Nitin Ladva** as research director, EMEA. Ladva will be based in London.

Audra Priluck has been promoted to vice president, business development, media and technology, at *Ipsos OTX MediaCT*, a Los Angeles research company.

Exhibit Surveys Inc., a Red Bank, N.J., research company, has hired **Alissa M. Algarin** as senior project manager.

Atlanta research company *Abt Associates* has added **N. Cinnamon Dornsife** to its board of directors.

Michael McCrary has been named president of *Federated Sample*, a New Orleans research company.

D3 Systems, a Vienna, Va., research company, has hired **Amanda Bajkowski** and **Brian Kirchhoff** as senior research analyst; **Benjamin Stevenson** as research analyst; and **Timothy Van Blarcom** as junior statistician.

Adam Weinstein has joined New York research company *Universal Survey* as chief sales officer.

Cincinnati research company *MarketVision* has promoted **Marsha Calloway-Campbell** to vice president and **Lynn Leszkowicz** and **Prasad Samala** to research manager, marketing sciences.

Calloway-Campbell

Leszkowicz

Samala

Havemann

Chris Havemann, president and CEO of Plano, Texas, research company *e-Rewards Inc.*, has announced his decision to leave the company.

The Advertising Research Foundation (ARF), New York, has added Dallas research company *Toluna*'s **George Terhanian** to its board of directors. Separately, the ARF has hired **Robert Woodard** as executive vice president, advertising effectiveness.

Phoenix research company *Blueocean Market Intelligence* has hired **Dennis Goodman** as senior research manager; **Caryn Marchuk** as account manager; **Andrea Libey** as manager, marketing and corporate communications; and **Kat Bogdan** as assistant research manager. **Kirsten Markson** has been promoted to account director.

Prince Market Research, Nashville, Tenn., has hired **Sheila King** as research director and **Magdalena Dutkiewicz Vaughan** as research associate.

King

Vaughan

Paris research company *Ipsos* has appointed **Jeff Cail** as president and CEO of U.S. operations.

Port Washington, N.Y., research company *The NPD Group* has appointed **Tim Bush** as group president, Asia-Pacific. Bush will continue in his current role as general manager, technology analyst business, based in Hong Kong. Additionally, NPD has named **Kevin Gilbert** director, home improvement.

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Kinesis updates its Community and Survey platforms

Kinesis Survey Technologies LLC, Austin, Texas, has released a new version of Kinesis Community, a market research online community Web site solution bundled with Kinesis' panel management application Kinesis Panel. The latest version is intended to enable one-click deployment and full support for the latest generation of touchscreen mobile devices, including the iPad2 and iPhone4, BlackBerry Playbook, Motorola Zoom and other Google Android Honeycomb-based devices.

Separately, Kinesis has partnered with Infotech Global, a Piscataway, N.J., technology services company, to develop a proprietary survey conversion process designed to offer automated survey migration services for companies that wish to transfer existing survey projects from another survey solution to the Kinesis Survey platform. For more information visit www.kinesissurvey.com.

Millward Brown debuts two social media offerings

New York research company Millward Brown and its digital practice Dynamic Logic have launched FanIndex, a solution for measuring the impact of brand pages on social platforms. FanIndex is designed to provide quantitative measurement of Facebook fan page performance along with diagnostics to help optimize page content.

Additionally, Millward Brown and Kantar Media Cymfony, a New York research company, have introduced a suite of online listening solutions merging Kantar Media Cymfony's analysis of social media and online discussion with Millward Brown's brand and communications research. The solution suite is designed to run alongside Millward Brown brand tracking programs. It also lets clients engage in real-time monitoring and crisis management to allow brands to quickly listen and respond based on real-time consumer conversation; understand brands more completely by complementing traditional equity and communications research with consumer commentary; and inform survey design to ensure studies are created in the language and terminology consumers use and focused on the most relevant category drivers. For more information visit www.millwardbrown.com.

Vantis Concepts updated to deliver KPIs faster

Ipsos Vantis, a division of New York research company Ipsos North America, has updated its Vantis Concepts solution to reduce the amount of time needed to deliver KPI results to clients. Vantis Concepts is a testing program that aims to uncover mass-appeal ideas as well as hidden winners, breakthroughs and niche plays that are often missed. Each concept is compared to a normative database containing 23,000+ tests across several sectors. Each test includes a market success score; key measure scorecard; customer targeting profile; message and buzz power scores; and a detailed phrase-by-phrase analysis of which messages motivate the consumer to buy. For more information visit www.ipsos-na.com/media.

Colligent debuts MeQ for social media engagement tracking

Bellevue, Wash., research company Colligent has released MeQ (mutual engagement quotient) to measure the level and strength of engagement between two entities. MeQ has been designed to cross-compare the Facebook Likes, Twitter follows and other engagement behaviors of more than 270 million consumers with a database of 36,000 music, TV, radio, movies, sports, magazines and brands. This information is used to create the MeQ score for every entity tracked in the Colligent system, thereby enabling companies to identify the strongest business building opportunities via brand partnerships, sponsorships, media and communication. For more information visit www.colligent.com.

NVS: a metric for judging a company's success

B2B International, a Manchester, U.K., research company, has developed the Net Value Score (NVS), a metric that aims to provide the market's view on the perceived value offered by each company supplying a market. It can also provide the perceived value of a company's different business units, indicating where the company's value proposition is seen as the strongest and weakest.

The NVS is based on a calculation derived through asking three survey questions regarding how the supplier compares relative to other suppliers in the market on product and service benefits; pricing; and total value. For more information visit www.b2binternational.com.

M3 aims to analyze smartphone and tablet usage

Ipsos MediaCT, a London research company, and Zokem, an Espoo, Finland, mobile analytics company, have released M3 ("M Cube" for mobile measurement and motivation), a passive measurement solution designed to help U.K. clients understand consumer behavior around the use of new technologies. Respondents will first give authorization to download the app, which will then record all of the respondents' interactions with their mobile device. The system can be switched off at any time.

Ipsos and Zokem will produce trend data from dedicated panels in the U.K., as well as from other countries. These results will be delivered as standard reports to provide the major smartphones and tablets trends for each country. Additionally, M3 can be deployed on any ad hoc

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Hall test / CLT
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75% of our clients are American companies

research industry news

News notes

Following last year's imprisonment of Karen Forcade of **Youth Research**, Tampa, Fla., for falsifying data in connection with child safety tests on cigarette lighters made or imported for sale in the U.S. from 1994 to 2005, **Joyce Serventi**, president of the New Jersey corporation contracted to do the testing for Youth Research, pled guilty to one count of conspiracy. On August 1, Serventi was sentenced to two years of probation and ordered to pay a $3,000 fine.

On August 4 the **District of Columbia's Board of Pharmacy** approved revisions to its regulations to broadly exempt market research from Washington, D.C.'s physician payment reporting statute. The decision clears the way for pharmaceutical market research to return to Washington and marks the successful conclusion of a six-month lobbying effort by the Council of American Survey Research Organizations, Port Jefferson, N.Y.

The revisions exempt payments made to health care practitioners for participation in market research from the reporting requirements of the AccessRx Act if the market research is conducted by an independent survey research organization; the pharmaceutical client does not know the identity of the practitioners who participate in the research; and the payments are determined and made directly by the survey research organization.

Johnson City, Tenn., research company **Smarty Pants LLC** has settled a trademark infringement dispute with SmartyPants Research Services LLC, Washington. Smarty Pants LLC claimed that SmartyPants Research Services LLC violated its prior and superior rights to use the "Smarty Pants" trademark in the field of marketing and market research. According to the terms of the settlement agreement, SmartyPants Research Services LLC has discontinued use of the Smarty Pants mark or likeness in all forms and transferred ownership of eight Web site domains, including SmartyPantsResearch.com and SmartyPants-Marketing.com to trademark owners Smarty Pants LLC.

Waltham, Mass., marketing software company **Affinnova Inc.** has been awarded its sixth patent for marketing innovation from the U.S. Patent and Trademark Office, Washington, D.C., for its "method and system for predicting personal preferences."

Rochester, N.Y., research company **Harris Interactive** has announced plans to close its Asian operations in Hong Kong, Singapore and Shanghai and to reduce its staff in the U.K. by 50 full-time employees, according to a July 20 article in the *Rochester Business Journal*.

Additionally, Harris Interactive plans to consolidate its leased premises in Norwalk, Conn.; Portland, Ore.; and Brentford, U.K.

Infogroup, an Omaha, Neb., research company, has laid off 140 employees companywide, according to a June 30 report in the *Omaha World-Herald*.

The GfK Group, a Nuremberg, Germany, research company, has unveiled a new corporate strategy starting January 1, 2012. GfK will focus its businesses and consolidate its portfolio into two new sectors: Consumer Choices and Consumer Experiences. The Consumer Choices sector will focus on market sizing, market currencies and convergent media and sales channels and the Consumer Experiences sector will concentrate on consumers' attitudes and behavior. The two sectors will deploy new global and regional teams.

Acquisitions/transactions

Reston, Va., research company **comScore Inc.** has agreed to acquire **AdXpose**, a Seattle verification company, for total consideration of $22 million in a primarily stock-based transaction.

Melville, N.Y., research company **Verint Systems Inc.** has agreed to acquire Dulles, Va., research company **Vovici**. The companies plan to launch a Verint-Vovici voice-of-the-customer solution.

Cincinnati marketing company **Empower MediaMarketing** has acquired Cincinnati research company **Market Intelligence Group**. The combined entity will form Empower's Market Intelligence Practice.

San Francisco research company **Webtrends** has acquired Culver City, Calif., research company **Reinvigorate** to offer analytics for mobile, social and Web channels as a real-time solution.

Washington, D.C., research company **M3 USA** has acquired **Doctors.net.uk**, an Oxon, U.K., network of physicians.

Oslo, Norway, research company **QuestBack AS** has acquired and will merge with Cologne, Germany, research company **Globalpark**.

London market research network **Aegis Group PLC** has sold Chicago research company **Synovate** to Paris research company **Ipsos** for £525 million.

Columbia, Md., research company **Arbitron Inc.** has acquired Espoo, Finland, research company **Zokem Oy**. Zokem will operate as Arbitron Mobile, led by Zokem founder and CEO Hannu Verkasalo.

Toronto research company **LoyaltyOne** has expanded in India with an investment in Mumbai,

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By Jerry Arbittier

A systematic method for checking online questionnaires

When we developed our first physician Internet panel in November 2000, the aspect that was quite astonishing was the speed with which physicians completed the study. We programmed our first study, mailed out our recently-recruited e-mails and waited in anxious anticipation to see what would happen. Every hour we would check the counter and every hour we would see the number of physicians completing the study at a faster rate than we ever saw before. We realized that we had a technique that would allow us to complete studies in half the time than traditional phone survey. But, as Ralph Waldo Emerson once said, for everything you gain, you lose something else.

One of the major downsides of getting a quick response was that if you made a mistake in the survey, you had a great deal of garbage data. When we do physician studies, not only do we have to pay for the sample, we also have to pay the physicians for their time. While honoraria and recruitment costs were much lower than in the past, for a 45-minute study, you could be paying as much as $300 for studies with surgeons, oncologists and other hard-to-reach groups. When you recruited the sample by telephone and were only able to obtain five to 10 completed respondents in the first few days, the costs of a mistake were high but bearable. However, when you recruited 100-200 physicians on the Internet in the first day or two, the cost of a mistake could impact someone's job security.

snapshot

The author explains how his firm's BOWLSR technique can avoid survey instrument - based problems with online research.

Editor's note: Jerry Arbittier is president of New York City-based SurveyHealthCare. He can be reached at 212-290-7642 or at jerry.arbittier@surveyhealthcare.com. To view this article online, enter article ID 20111001 at quirks.com/articles.

Since none of us wanted to lose our jobs, we developed techniques to check Internet surveys that would reduce the possibility of a mistake. We needed to develop methods that were different from traditional checking methods - the Internet required it. An Internet survey is a self-administered instrument. In a telephone interview, if the program has an error in it, the telephone interviewer may notice something. For example, if a skip appears and there are no brands to choose on the screen, the interviewer could quickly report something is wrong. There is no one who plays this role for an Internet survey.

Therefore, we developed a method that we called BOWLSR to check an online questionnaire. It was

a simple acronym that allowed us to review each question on the following six parameters:

B = blank screen
O = order
W = words
L = logic
S = skip
R = range

The purpose of this article is to show how to use this technique to reduce the number of discrepancies from the written questionnaire to the final programmed survey instrument.

Blank screen

This check is one of the easiest to perform and probably the easiest to forget to perform. When a programmer sets up a question for a survey, one of the parameters they must set is the requirement that a respondent provides a response. I have gone over numerous questionnaires where the programmer may do this for all questions except one or two. It is especially true for open-ended questions. Many times the respondent will not enter a response to the open-ended question and click to the next question. When you look at the data, you wonder, did they really mean to leave it blank or did they just click [Next]?

The check is really easy. Every time you go to a new screen that requires a response, the first thing you do is click [Next]. If the program does not provide an error, then you know you likely need to make a correction. It is important to do this before doing anything else on a screen, because for certain types of questions, you can change an answer but not remove all responses. If while checking the survey, you were to first select a response before testing the blank parameter, you would only be able to remove your selection by selecting another response and therefore you would not be able to check a blank screen without starting over.

Order

The order parameter has to do with the order of how the rows or columns should appear on the screen. The survey developer may want to randomize the presentation of rows or columns on the screen. In reviewing the questionnaire, you need to look closely because the instruction to randomize may be hidden in the question's text. The good news is that typically when the questionnaire designer reviews the questionnaire, they will pick up this error right away.

However, there is something that is more subtle that is often missed. Many times the order of presentation becomes important during analysis. Therefore, you may need to have a field in the data that indicates how the data was ordered. This is not difficult for the programmer and can be a lifesaver when the analyst starts to question why certain answers are not consistent.

Words

This parameter seems obvious. Basically you need to proof the questionnaire to make sure that all the words in the online document are exactly as shown in the questionnaire. And if that is all you do, you have missed the point. While proofing is important, it is even more important to make sure that the words make sense. I would say that at least one out of every three questionnaires has something written that does not follow the true meaning of the questionnaire. For example:

- Questions reference the wrong information from a previous question. This is so easy for a questionnaire designer to do, since they may have revised the questionnaire numbering multiple times before you see a final version.
- The scale will say one thing and the questionnaire description will say something else.
- Questions will ask to compare different brands but the respondent may have said in an earlier question that they were only aware of one of the brands.

Reading the words is not nearly as important as making sure they make sense - with one final caveat: Never change the smallest thing without telling the survey developer. When a designer sees that you made a change without telling them, they will immediately want to know if you changed anything else and will lose faith in your programming, even if you think you are correct.

Logic

The survey developer will provide the logic for many questions in a questionnaire. They will indicate, for example, that:

- In a best/worst scenario, only one option is allowed to be designated as "best."
- Two choices cannot have the same rank.
- Many conjoint or max-diff

questions will have a particular design logic.

The good thing about logic instructions is, because they are difficult, the survey developer usually makes extra effort to explain them in the questionnaire. The bad thing is, because they are difficult they are hard to check. The best thing to do is to write up different scenarios on the logic instruction and test them. Typically, this will allow you to see if things are going correctly.

Skip

Everyone knows that questionnaires have instructions to skip questions. Therefore, you usually look for them and make sure the skip is working properly. There are sometimes very difficult skip patterns but if you take your time to follow them all through, you will get them right. The one tip I can give here is to look for the questions with skips before starting to check the questionnaire. Usually this will help to understand the questionnaire better. In addition, there is nothing more frustrating than getting to the end of the questionnaire and realizing a question at the end required a particular choice at the beginning and you are forced to start over to test that particular skip.

Range

A survey developer may specify that certain responses cannot be greater or less than a particular number. Or they may say that a response needs to be less than a response in a particular question. For example, if a respondent says that overall they treat 500 patients a month, they cannot say in a follow-up question that they treat 550 asthma patients a month.

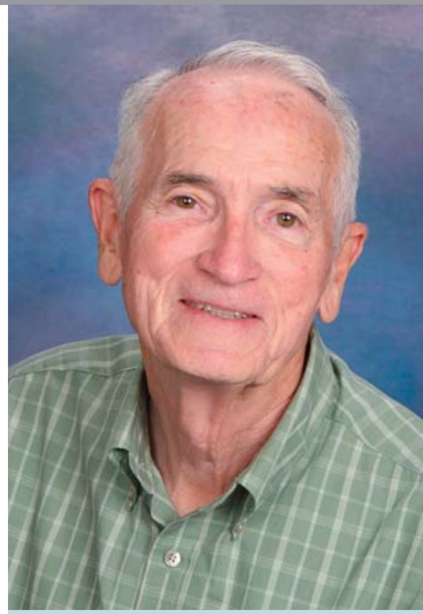
Checking a range is easy. You test to see if one above the high range and one below the low range gives you an error. Then you check the high and low range to see if you can go to the next screen. The only real issue is to not forget to check all the ranges. If the analyst gets the data and finds inconsistency in the data because range controls were not incorporated into the questionnaire, it can get very tedious trying to clean the data.

Maintain quality

This article provides a modality for checking an online questionnaire so that you can maintain quality and eliminate expensive mistakes. There are many other things you can also do to enhance quality: perform pretests; have a formal questionnaire review before starting to program; ask a programmer to look at the logic within the program using the program's checking tools; run dummy data; and review live data before going out to many respondents.

While the above are all necessary and important, the BOWLSR technique will allow you to gain a much deeper insight into the questionnaire. It provides such a good foundation that in many cases you will feel that you understand the questionnaire better than the survey developer. And if the survey developer is also your primary client contact, there is nothing that will cement your relationship with your client more than for them to realize how concerned you are that the research is being done properly. | Q

What's in a name?



Tom Quirk explains the origins of *Quirk's Marketing Research Review*

By Tom Quirk

While longtime readers of Quirk's *may recognize Tom Quirk as the man whose last name gives* Quirk's Marketing Research Review *its distinctive title, there are many others who don't know the story of how the magazine came to be.*

In a nutshell, in the course of his years in the publishing and marketing research fields, Tom repeatedly saw the need for a publication that could educate marketers on the use and value of research. And, since people often come to marketing research positions from a variety of backgrounds and hence may not be versed in all of the techniques and their accompanying jargon, the magazine's content would have to communicate to a wide audience, from the seasoned pro to the marketer-in-training.

Here, then, is Tom's take on how it all happened.

After my army service was completed in 1956 I returned to the University of Minnesota and took a number of advanced math and economics classes with the thought of obtaining a graduate degree in one of those two fields. It had always been my intention to work within the business community and thus the degree itself was not of much importance. Thus, when an older brother who was doing market research at G.H. Tennant Co. decided to return to college to obtain a Ph.D. and suggested I replace him, it took me only a few minutes to make the move away from academia. (It was a good decision for my brother as he went on to become a noted econometrician as a professor at Cal Tech.)

snapshot

Quirk's founder and publisher emeritus Tom Quirk tells the story of how his early careers in publishing and marketing research led to the creation of the magazine that bears his name.

The main emphasis of the position was on studying the markets that the company's products served using government census of manufacturers statistics and information from within the organization. Using this information we attempted to forecast unit sales by setting sales quotas and assist the production department in inventory. Similar work was done at my next place of employment, the D.W. Onan Co. At no time were either of the market research departments asked

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to evaluate or assist in the marketing of the products themselves.

In 1963 I was hired as the director of research for Minneapolis-based Miller Publishing Company. It was a 90-year-old business magazine publisher with a strong position in the field of agribusiness. Each publication group had a marketing director who had considerable autonomy in the way in which his/her publication was presented to customers and prospects. My arrival on the job came shortly after the company had created a division for two retail merchandising magazines. It was a competitive market and the marketing director, Paul Anderson, asked for my assistance in creating a plan that would make the Miller Publishing magazines industry leaders.

Wanted ideas and information

Most publications at that time presented market data that were acquired from third-party sources and available to everyone. We found that that their customers and prospects wanted ideas and information on ways they could be more successful in selling their products and services. We found that establishing a panel of retailers who represented the universe gave us an opportunity to meet this need. The response from the core audience was very positive and both publications achieved above-average growth.

The response from the Miller Publishing management encouraged more innovation and the department staff was enlarged. Included was a young researcher, Dale Longfellow, who provided a number of ideas to help the company's publications maintain their positions as leaders in each of their respective fields.

Prior to 1968 all of the data we presented was done for the publications and made generally available. But we were beginning to have requests from major marketers to use our lists along with our knowledge of the various markets to do proprietary studies. Our first reaction was mixed. We were flattered by the faith in us by these companies but there was also concern how we would be able to insure that we could provide the confidentiality that is so critical to proprietary work.

We finally were able to solve the problem by separating our commercial research and the in-house research functions. All commercial research was done at a satellite location with employees specifically assigned to those functions.

Had little experience

It was shortly after embarking on the commercial research project that the idea of a publication for those involved in marketing research crossed my mind. When presenting data from our magazine research we usually met with marketing directors or advertising managers. Now we were calling on members of the market research departments. While the department managers were aware of the various techniques, many of their analysts had little experience in marketing research. Many firms used this position as part of long-term training in their marketing system. Many analysts did not view the position as a permanent job. All of this tended to make projects take longer than necessary and to subject clients to additional costs.

Another problem was the lack of confidence in research departments within certain companies. The departments did not have evidence that other firms were successfully using marketing research to increase sales and profits. We, of course, could not disclose how a number of our projects had done just that.

We needed a way to show how research had been beneficial. Confidential information was not needed to do this. Rather, clear, understandable examples of how filling an information gap helped an organization meet its marketing or advertising goals would do the trick. It would be something that a research manager could use as an example to show to higher management. The magazine would also provide news of the industry and the personnel involved. Information on providers of related products and services was also needed.

I set these ideas aside as I concentrated on my work but in the ensuing time I encountered several other instances where examples of successful applications of marketing research would have been helpful.

In 1978 the Miller Publishing Company was sold to American Broadcasting Company and I was required to sign a 66-month employment agreement. In 1984, with two associates, I started a new company, St. Paul, Minn.-based Rockwood Research Corp., which was immediately acquired by *Farm Journal* magazine. That employment agreement only lasted until 1986 when I, at last, had the opportunity to fulfill my dream.

A number of friends helped

Although I had been with publishing companies I had never been responsible for putting out an issue. Fortunately a number of friends helped through the first few issues including Emmet Hoffman, Dave Hahn, Keith Hunt and Robert Truhlar. They provided the necessary expertise to help us produce a credible product.

The response from the market was beyond expectations. In those early years, as today, we were guided by the ideas that a publication – especially in the business-to-business realm – will only be successful if it: reaches an audience that can be identified and quantified; provides unique and needed editorial information; and has a potential advertising base to provide financial support.

Just as essential, we've found over the past 25 years, are hard work, adaptability, strong customer service and a true respect for and enjoyment of the industry the magazine serves.

As we celebrate this milestone, I, along with the entire *Quirk's* staff, would like to thank the marketing research industry for supporting our efforts with their time, their marketing and advertising dollars and their attention and enthusiasm. We truly could not have succeeded without you. | Q

Quirk's 25th Anniversary

A look back, a look ahead

Researchers weigh in on the past 25 years and opine on the next

By Joseph Rydholm

snapshot

Research veterans give their views on what the industry's done right - and wrong - over the past decades and what we can expect the future to hold.

Editor's note: To view this article online, enter article ID 20111003 at quirks.com/articles.

No matter what industry you're in, 25 years is a long time. A lot can happen. Certainly the past two-and-a-half decades have seen a host of changes in the marketing research realm.

When *Quirk's* began publishing in late 1986, door-to-door had been shown the door, swept out by phone and mail research. Computers and their data-crunching power grew in import during the 1990s but the real sea change came with the advent of the Internet. At first the focus was on transitioning quantitative research that had previously been conducted offline to the online space. Then, as the Web matured and technological innovations proliferated, the focus on duplicating the traditional offline survey-taking experience fell away and creative researchers sought to improve the respondent experience (and, hopefully, the resulting data) by seizing on the Internet's unparalleled abilities to engage and entertain. Those same qualities convinced researchers in the qualitative camp that the

April 1986: Quirk Enterprises opens for business and hires its first employee, Jim Quirk, to do circulation work part-time

August 1986: Beth Hoffman named managing editor

January 1989: Quirk's expands to 10-issue publication schedule

June 1990: Evan Tweed hired as sales manager

January 1993: Dan Quirk hired as marketing manager

January 1994: Steve Quirk hired as directory editor

December 1994: War Stories column debuts

1986	1987	1988	1989	1990	1991	1992	1993	1994	1995

October/ November 1986: Inaugural issue published

October 1986: Quirk's circulation reaches 13,000

August 1988: Joseph Rydholm replaces Beth Hoffman as managing editor

August 1990: First SourceBook published

August 1993: Quirk's circulation reaches 15,500

May 1995: First mention of online focus groups in the magazine

online space was a boon for qualitative undertakings. And, as if those frontiers weren't promising and exciting enough, then smartphones and tablet computers hit the scene, opening up whole new options for researchers of all stripes, from quick-hit mobile surveys to deep-dive, consumer-generated explorations.

To get a sense of where we've been and where we're going, we e-mailed short questionnaires to a handful of veteran research industry members. We asked them to look back 25 years, look ahead to the next 25, talk about what marketing research has done right and done wrong, assess the current state of things and close with some words of advice to those just entering the profession.

What factor or factors have had the greatest influence (positive or negative!) on marketing research over the past 25 years?

"New technology. Twenty-five years ago, we had no fax, no CATI, no Web sites, no search engines, no smartphones (no cell phones), no e-mail, no online panels - everything is different in how we do business. This has had both a positive impact (instant search for information, showing respondents streaming video online) and a negative impact (clients expecting suppliers to be available by cell/text/e-mail 24/7; the death of the representative sample)." — *Ron Sellers, founder, Grey Matter Research and Consulting, Phoenix*

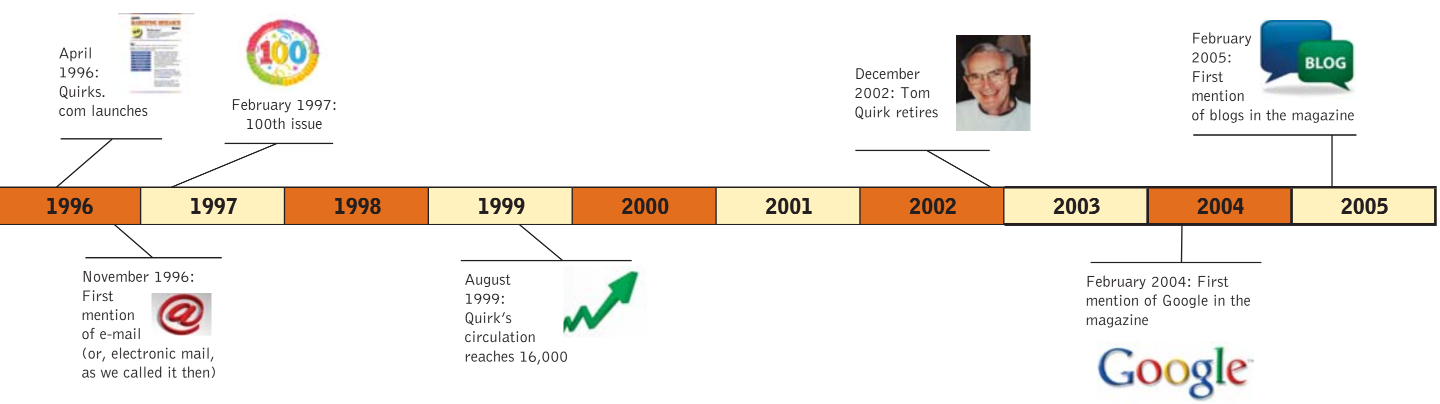
"I think one of the biggest changes was the advent of telephone and CATI research technology because it did away with most door-to-door research. At the time, most felt it would ruin research quality because we would not know for sure who was being interviewed. The second big factor was technology in the form of inexpensive PCs, which made widely-distributed data analysis possible. Another factor is the Web. Like telephone research before it, Web research is taking over the industry and many of us are concerned about a perceived decline in research quality." — *Don Marek, executive director, Marketing Research Institute International, St. Louis.*

"If we roll the clock back to 1980-1985, the men and women who were assuming leadership of our industry (in their early 40s or older) were, for the most part, classically trained in marketing. Most were solid researchers with extensive experience. Many were formally trained in science and scientific methods. The high quality of this leadership group, collectively, has been a major factor in the growth and development of the research industry over the past 25 years.

"The intrusion of public money into the research industry began in earnest after 1990, as larger firms began to acquire smaller research firms. Since it was easier for European firms to raise money in public markets in Europe than it was for U.S. firms to raise money in the U.S., the ownership of what had been an American industry shifted quickly to Europe. Most of the largest research firms are now headquartered in Europe. Within the last 10 to 15 years, venture capital and private equity firms have aggressively moved into the research industry, just at a time when growth in the industry was beginning to slow. The net effects have been an intensification of competition in the industry, more rapid change, greater instability and more decisions based on short-term profits rather than the long-term good of clients." — *Jerry Thomas, president and CEO, Decision Analyst, Arlington, Texas*

"I think the Internet has had the greatest influence, and I think it has been the most positive AND the most negative influence. Positive because it allows for faster and less expensive research that more people can do, which is also its weakness because now, 'anyone can be a researcher' with no training at all. If it were not for the Internet, it would be extremely difficult to get representative samples by age due to the decline in landlines. Another major influence has been increased privacy concerns, which have the result of bringing legal issues into research more than they have ever been before." — *Jim Nelems, CEO, The Marketing Workshop, Norcross, Ga.*

"As a direct result of the Internet research experiences of research sup-



pliers and users, new research methods and tools no longer face the same kind of lengthy, uphill battles they formerly faced to be considered, tested and implemented. Thus, new ideas come to market and can mature into valuable new capabilities much more quickly than before. Look at mobile research and, now, social media research, as prime examples. In addition, the pace at which new capabilities are refined and improved has been accelerated.

"Internet research also has changed the face of who owns research companies. The industry is now characterized by behemoth research organizations as well as innumerable startups (both from longtime research stalwarts and a slew of entrepreneurs without any research upbringing)." — *Bob Lederer, editor and publisher, RFL Communications Inc., Skokie, Ill.*

"In terms of positive trends: Technology in qualitative - online, social media, mobile, user-generated photography/video, analysis software and so on. The use of technology greatly expands what we can do. More 'be-there' research - observing or accompanying people in their lives rather than depending on what they think they think, say they think/feel. Also, fields like neuroscience and behavioral economics are altering our view of human psychology and, as a result, raising questions about what role qualitative research (and quantitative, for that matter) will play in the future." — *Judy Langer, president, Langer Qualitative, New York*

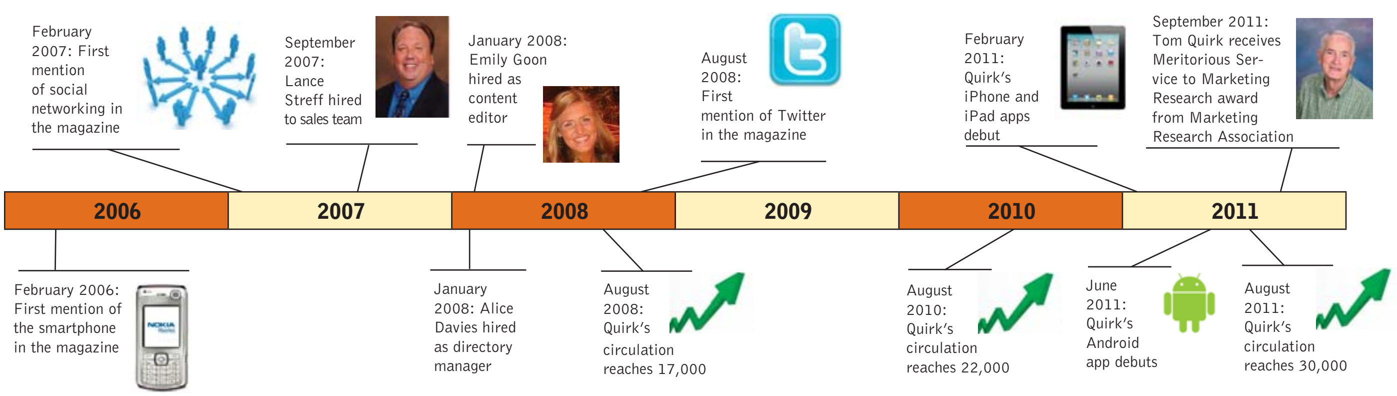
"Technology has had a huge influence on the person-to-person relationships that were so much a part of our business [focus group facilities]. Instead of a moderator or a familiar contact at the field department of a manufacturing company or ad agency calling to chat, giving the specs and then calling to book the study, a bid sheet is e-mailed and when you do get someone on the other end of the phone they really can't answer your questions and may take days to get back to you. For so many years price was never an issue - if we had the room available it was a done deal. Today the client is given a bid by one of several facilities in the area and the job goes to the lowest bidder regardless of their ability to recruit according to specs." — *Merle Holman, CEO, Group Dynamics in Focus, Bala Cynwyd, Pa.*

What factor or factors will have the greatest influence (positive or negative!) on marketing research over the next 25 years?

"Smartphone and tablet technologies are emerging as the new driving force behind our lives. Few of us have landlines and soon we will no longer have desktop computers, with laptops exiting close behind. Our busy lives are centered around these small devices that give us access to everything at the push of a touchpad. This will have both positive and negative impacts on how we do business. We must be prepared for the change or we will lose touch with the staple of our existence as researchers - the consumer opinion. We must meet consumers where they are." — *Jay Mace, senior vice president, McMillion Research, Charleston, W.Va.*

"The advent of social media and how consumers not only communicate with each other but with advertisers will no doubt have the most significant impact on our industry. Consumers now have unparalleled access to communicate and discuss brand preference as well as satisfaction/dissatisfaction - both actively and passively. As an industry we're going to be challenged with how to best harness this data while not isolating respondents or violating privacy rights." — *Kristin Luck, president, Decipher Inc., Fresno, Calif.*

"Things are exciting for qualitative, and fairly bleak for true quantitative. We have so many more creative options for qualitative - video diaries, online picture sorts, mobile MR, etc.



The challenge, as with any new tools, is learning to use them in a way that actually makes a difference, rather than just using them 'cause they're cool. For quantitative, we have lost the ability to have a true random representative sample. Call-blocking, cell phones and plummeting response rates have hurt phone; online panels are not truly representative and mail is slow, clunky and has low response rates as well. If the 1,000 people we interview don't really represent any larger population statistically, what reason is there to do quantitative research?" — *Ron Sellers*

"The other big technological change is data integration. Yet-to-be-invented large systems and new software will enable us to integrate Web, telephone, social networking, eye tracking, scanned, mined and passive data research into market intelligence. Combining this data will enable us as an industry to get the big picture and overcome regulatory and privacy issues." — *Don Marek*

"We work with many large organizations and the greatest problem they face, day after day, is confusion. Our clients are awash in a sea of data, consultants, gurus and professors and don't know who to believe or what to believe. This turmoil creates opportunities for those with charisma and a good story to lead the confused astray. Companies must focus on the basics - research, science and truth - to succeed over the next 25 years. They must not fall prey to mythology and the limitless promises of false prophets." — *Jerry Thomas*

"Just as important to the future of our industry will be our willingness and commitment to fall in line with respondent whims and preferences. The record-setting (in time) wearout of online research respondents is not something we can afford to see happen with other new research capabilities. I have spoken publicly about the industry's need to adopt a platform that commits all of us to do everything we can to find the pleasure points of everyone under the age of 30-35 in order to ensure their participation in our future research efforts." — *Bob Lederer*

"The goal of research has always been to find out what drives people's emotions and behavior, and today we have more tools to help us understand. We also confront some existential questions: Will biometric measures of what people are 'really' feeling and social media monitoring of what they are saying supersede the ways we currently talk with, observe and interact with them? My hope is that the answers will come from solid research on research." — *Judy Langer*

What have we, as marketing researchers and as an industry, done right over the past 25 years?

"Opened up qualitative research to deeper, wider thinking; new, revived methods, including getting more from 'traditional' qualitative." — *Judy Langer*

"I think we were challenged to take advantage of the Internet and related technologies in a way that forced methodologies, sampling and overall survey presentation to change. While some still argue the pros and cons of this evolution, we have found how to make it work as an industry and in a manner that meets the general public where they are and also holds to the core values that as researchers and data collectors we must always strive to uphold." — *Jay Mace*

"In some cases, we have managed to get a seat at the strategic table as true partners rather than just order-takers. Twenty-five years ago, it was more common (at least in the companies where I worked) simply to pass along the findings to the people who would use them. Today, it's more common to help the end-clients use the findings and to be consulted for input on the meaning of the findings rather than just providing the data." — *Ron Sellers*

"As an industry, we have done a great job as research technicians. We have developed and refined our sampling, our software and systems, the methods of data collection, our analytical tools and techniques. Collectively, we have helped grow the marketing research industry over the past 25 years - and that is a great success. We have helped countless corporations do a better job developing and marketing their products by providing the science-based data required for sound decision-making. We have taken market share away from advertising agencies - who used to be major players in the research industry." — *Jerry Thomas*

"We've done a great job of embracing new technologies, like online and because of that, we're now seeing earlier acceptance of emerging research methods (mobile/social media)." — *Kristin Luck*

"We have maintained our standards but also somewhat adapted them to changing respondent needs - although not as aggressively or effectively as is necessary. Our respondent base is changing even more quickly than the research industry itself and it will continue to do so for the foreseeable future." — *Bob Lederer*

"[On the qualitative front] there are a number of things done 'right' and they include: paying respondents a fair fee for their contributions to research; finding ways to limit repeat respondents;

creating facility settings that widen the modalities for conducting market research; training researchers who can efficiently collect data for strategic decision-making by clients; creating an organization of qualitative researchers committed to ethical research practices; helping clients see qualitative research as a full member of the research industry and not a stepsister to quantitative." — *Naomi Henderson, CEO and founder, RIVA Market Research and RIVA Training Institute, Rockville, Md.*

Where did we blow it?

"We could have done a better job embracing Web research in the beginning. I was shocked at the 1997 Research Industry Leadership Forum when leaders of the biggest U.S. research companies attacked Web research. Our industry succeeded despite itself." — *Don Marek*

"Not making the transition [to the Web] as an industry sooner. We allowed technology-based companies, not research companies, to take the lead in our backyard. This caused innumerable quality-assurance issues and the need for end users to question the value of our reporting. While we recovered, the stigma continues to be addressed at virtually every conference or end-user presentation I am privy to." — *Jay Mace*

"The quality of some of what passes for marketing research is horrible. DIY contributes to this but is not the only cause. Also, we still struggle to be seen as essential rather than as optional. When budgets get tight, that's the time to spend on research, but that's the time research usually gets slashed - much like advertising." — *Ron Sellers*

"The research industry has tended to focus on corporations with marketing research departments. These departments are often below the C-level. Accordingly, our industry has been outflanked by the consulting industry. Consulting firms have sold their services to C-level executives, especially the president, CEO and board members. Oftentimes, research companies actually have the experience and skills to do a better job than the consultants (especially in the marketing arena) but never have the opportunity to pitch their ideas or submit proposals.

"The second missed opportunity may be characterized as 'lack of showmanship.' As an industry, we marketing researchers have tended to be focused on the technical details and the numbers, whereas our clients want to see pictures, video and colors and hear interesting stories. We must get better in transforming our numbers and facts into interesting narratives and/or movies our clients can understand and enjoy." — *Jerry Thomas*

"Our reliance on online methods to conduct research has created a distance between researchers and respondents. As we've moved away from face-to-face interviewing we've forgotten in many cases that there are actual people on the other end of our surveys and are abusing them via tedious, long surveys. Clearly there's been concerted industry effort in the last couple of years to address survey quality issues, however, there's still much work to be done." — *Kristin Luck*

"We have never done a good enough job of promoting our industry to the general public. We count on them for participation in our research efforts and they are our lifeline to data. With greater promotion of our industry we would build better respondent cooperation." — *Steve Schlesinger, CEO, Schlesinger Associates - New Jersey, Edison, N.J.*

"We didn't 'blow it' but we've become far more trendy and gimmicky. Little research on research is done but, instead, self-interested researchers (suppliers and clients) simply pronounce that their 'new' methods - sometimes new in language only or old/revived - are superior to traditional ones." — *Judy Langer*

"Letting clients dictate research modalities that pandered to egos rather than sensible research designs. For example, clients would ask that IDIs be conducted to limit the influence of thought leaders rather than finding researchers who knew how to successfully manage thought leaders in group settings. Relying solely on qualitative research findings for decision-making rather than matching it with quantitative research to get the full picture." — *Naomi Henderson*

Is marketing research - as a discipline and a business decision-making tool - on the upswing or on the decline?

"I think we are emerging from a slight decline. I believe we have shown the tenacity for overcoming our own biases and fears and have embraced the revolutionary ways in which we do our jobs today, as well as in the years to come. We are no longer taking a backseat with respect to technology but, as an industry, we are at the forefront of developing tools and strategies for acquiring opinion and reaction from the masses to serve our clientele, using social media, mobile technologies and so much more." — *Jay Mace*

"As a discipline, it's on the decline. DIY, low-budget data collection that takes serious shortcuts and wanna-be moderators are all examples of where the discipline itself has fallen on hard times - anyone can write and program a questionnaire, pay $4 a person for crappy, no-quality-control online sample, and generate 'research.' " — *Ron Sellers*

"Market research as a decision-making tool is on the upswing but in a different way than in the past. The heavy reliance on data has given way to the need to be quick, focused on knowledge not data and leverage multiple touchpoints to understand the people, how they think and what they really want. Integration of multiple data points will continue to be paramount." — *Gayle Lloyd, head of product research, Batesville Casket, Batesville, Ind.*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Congratulations, Quirk's, on 25 amazing years!
22% FASHION
7% COMFORT
3% PRICE
68%
FEAR OF LOOKING LIKE YOUR FATHER?

"It is on the upswing. As business gets more complicated and global, the need for quick, accurate market intelligence becomes even greater. The integration of data collected through a variety of means and countries will become a more vital part of our industry." — *Don Marek*

"Marketing research is definitely on the upswing. There is little doubt that many more surveys are being conducted today than 10 years ago, thanks to low-cost, do-it-yourself survey tools and the spreading spiderweb of the Internet. Surveys are now being conducted by many different departments within corporations (without the knowledge of the other departments, in many instances). Of course, whether this survey data is of high quality, and whether that data leads to better decisions, is open to question. More secondary research data is available today than in the past and we see no decline in the quality or use of such data. More government data is available and is more widely used. More and better sales data is available, compared to the past, and analysis of that data falls within our purview. More money is being invested in shopping research. And, there are new sources of data (such as social media and Web chatter) that one might count as 'research' if one had sufficient faith. So, in total, marketing research continues to expand as an activity, but it is becoming more fragmented and perhaps more amateurish at the margins." — *Jerry Thomas*

"On the upswing. We are considered an important discipline within businesses and are getting more visibility higher up the food chain. The value of our deliverables is critical to solid decision-making and that is getting noticed more and more. As an industry we are also becoming more and more creative in our methods and how we bring insights to the end client." — *Steve Schlesinger*

"It is definitely on the upswing; incredibly larger numbers of research users are spending more money. However, we have a responsibility and task to both meet their changing needs and offer our own innovations that break the mold and present improvements on their stated needs." — *Bob Lederer*

What advice would you offer to someone just getting into the marketing research profession?

"Learn far more than the profession and the discipline. You have to do the research right but it is incredibly helpful to have a broad base of knowledge and interests. Read widely, absorb everything and don't limit your interests or conversations to research or business practices." — *Ron Sellers*

"Be multidisciplined. Become astute at understanding human beings. Do not be a victim of and a slave to data. Stay current. Develop fine-tuned listening skills. Learn the craft well but be creative." — *Gayle Lloyd*

"Hang on; you are in for an exciting ride! Know and use statistics/data analysis so your work is projectable. Embrace technology because that is where our main advancements will come from. Learn to like to travel; our global industry is going to require you to do it." — *Don Marek*

"Get into the trenches. Master basic skills. Learn the nuts and bolts. Master the science and methods of research. Learn marketing. The need for good research is greater than ever and the need for good researchers will grow. The companies that master marketing research have tremendous advantages over the non-users of research. Think about it this way: When you were in college, wouldn't it have been nice to know what questions would be on the test and what the answers were? That's exactly what good research can do for smart companies." — *Jerry Thomas*

"Learn (and do!) every piece of the research process - no matter how tedious or mundane. Without really understanding what goes into a study, from the design to field to working through the analysis, it's easy to lose sight of how important each phase is in the process." — *Kristin Luck*

"Try to start with the basics, such as interviewing. And read all you can. Young people today have never heard of the founders such as Alfred Politz or even know what an IBM punch card is." — *Jim Nelems*

"Market research is far more diverse than most outsiders realize. The stereotype is that it's a game of numbers and, more recently, of high-tech. In reality, if you have a deep curiosity about how and why people tick, you can find a niche to use your talents. Read key books and journals about the market research industry. Join the key organizations that support the ethics of this industry. Get training in the disciplines related to market research. Have a definitive philosophy about the role of market research in your career. Stay abreast of the trends in market research. For moderators, decide early on if your career will be as a niche or a general moderator. Be willing to say no to clients or client work that goes against your principles. Do not sacrifice family or health on the altar of the market research industry." — *Naomi Henderson* | Q

Shifts and changes

An analysis of the past 20 years of client-side research buying

By Emily Goon

Over the past 20 years, *Quirk's* has kept track of its readership and their research-buying habits. What services are the buyers of research most involved and interested in? What are their areas of research involvement? By asking these questions as part of our circulation management process we've been able not only to tailor our content to best suit the majority of our readers but also to track trends in corporate research: What industries are picking up their research-buying? What are people doing more of? Less? What can this tell us about the journey the research industry has taken? Or about the decades to come?

Quirk's new and existing subscribers are asked each year about their role in the research industry (i.e., job title); their involvement in different industries (i.e., consumer, non-durable; consumer, durable; services; business-to-business; and health care); and what research products and services they purchase - from full-service research, syndicated studies and personal interviewing to panels, focus group moderating and statistical analysis.

snapshot

Two decades' worth of data from the *Quirk's* circulation database is examined to discover what shifts have taken place in the research industry - including the advent of online and the latest economic crisis - and to predict where it might be headed.

Didn't suffer as badly

All the talk of research having suffered a serious blow during the Great Recession was not entirely imagined although many areas that were reportedly hit the hardest didn't suffer as badly as hyped, according to what our buyer-side readers reported.

Aside from online services, panels and omnibus studies, reported use among client-side researchers of nearly all other research products and services purchased fell off after 2008, with the biggest declines in telephone interviewing, mail surveys/lists, mall intercepts, focus group moderat-

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Figure 1: Reported Purchasing of Research Products/Services, 1992-2011

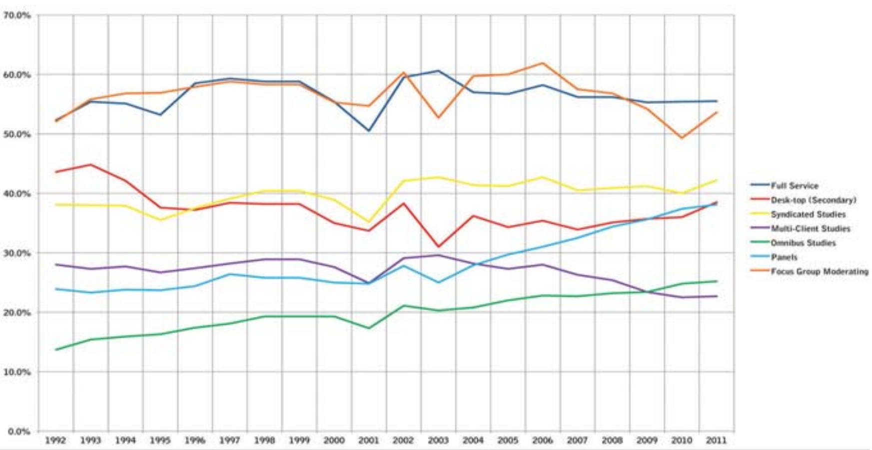
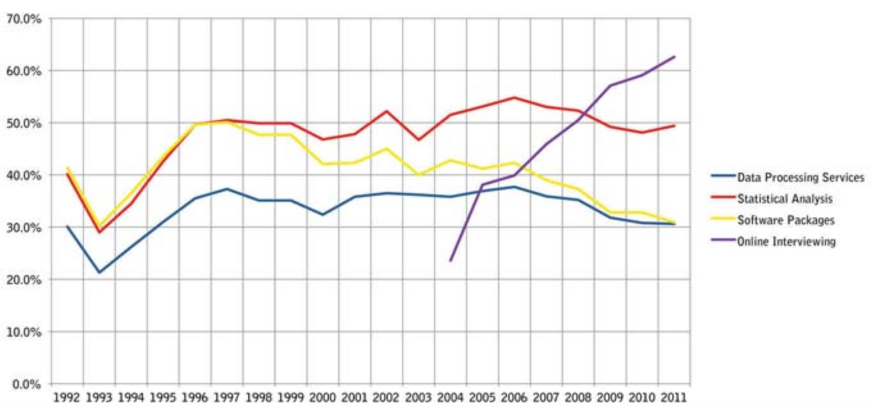


Figure 2: Reported Purchasing of Data Processing Services and Software, 1992-2011



ing and the purchasing of software packages and data services. Research buyers appear to have been investing their energy into more bang-for-your-buck services and software like secondary research, omnibus studies, panels and online interviewing - all of which increased from 2008 to 2011.

However, the ease and affordability of online panels and omnibus services have not detracted from interest in full-service market research services. Despite a 5 percent drop in 2001, followed immediately by an almost 10 percent increase in 2002 and continued into 2003, full-service research has maintained involvement around 55 percent for the past five years (Figure 1).

Corporate researchers' buying of focus group recruiting and/or facilities has held tight near 60 percent for the past decade, despite talk of qualitative being hit the hardest during the last economic downturn. Reported use of focus group moderating, however, declined over 8 percent in the past five years. This decrease could be in line with a downturn in qualitative research or general use of non-moderators for moderating.

Desktop or secondary research was on a somewhat steady downward trend, bottoming out at 31 percent in 2003, but it has slowly crept back up since 2007, perhaps as a cost-saving measure when custom research was not affordable in a suffering economy.

A meteoric rise

Not surprisingly, online interviewing has seen a meteoric rise - nearly 40 percent! - since we began tracking it in 2004. The 7 percent rise in reported panel-buying may also be attributed to panels moving more and more to online platforms, making it easier for corporate researchers to engage and manage panelists. Both telephone interviewing and mail surveys appear to have suffered some at the hands of all things electronic and online, with each dropping off drastically in 2006.

When it comes to data processing and software buying, online has dominated since 2004 (Figure 2). Use of data processing services (30.6 percent), statistical analysis (49.4 percent) and software packages (30.9 percent) have been usurped by the rise in online interviewing software (62.6 percent). Buying of online interviewing software is more than double data processing services and software packages combined and 13.2 percentage points ahead of statistical analysis software.

Hasn't been the full replacement

Although research activities online have gained popularity, they haven't been the full replacement that many feared when they first came on the scene. (Perhaps a predictor of social media research's trajectory among our audience?) Overall, from 1992 to 2011 reported use of telephone interviewing has only declined 7.9 percent (Figure 3). However, mail has fared far worse than telephone interviewing, declining a full 20

Figure 3: Reported Use of Research Field Services, 1992-2011

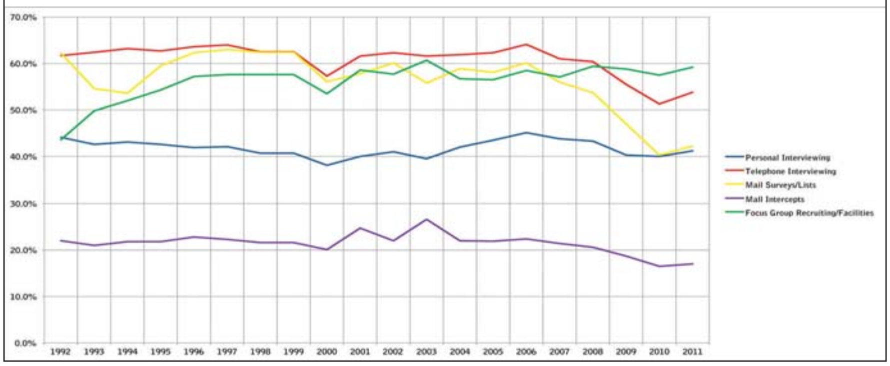
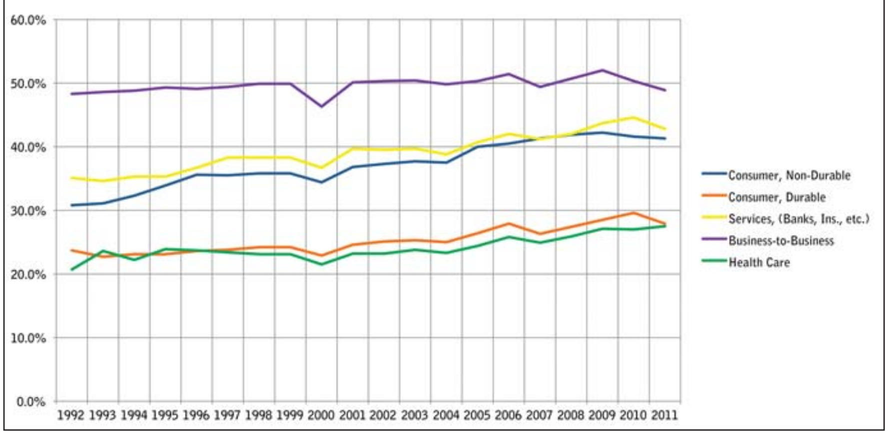


Figure 4: Reported Areas of Research Involvement, 1992-2011



percent in the past 20 years among our audience.

Dwindling interest

Along with the dwindling interest in snail-mail research products and services, *Quirk's* buyer-side readers are the least involved with mall intercepts. Mall intercept research is reportedly purchased the least (compared to personal interviewing, telephone interviewing, mail surveys/lists and focus group recruiting/facilities), although it saw spikes in buying in 2011 and 2003. Since 2003 buying of mall intercept services/interviewing has dropped off 5.4 percent, making it the least-popular by nearly 25 percent.

Overall gradual rise

Our client-side readership has seen an overall gradual rise in researchers involved in all industries. Involvement in the consumer non-durables industry began at 30.8 percent in 1992, hitting 40 percent in 2005 and staying around there for the next six years (41.3 percent in 2011) (Figure 4). Corporate researchers involved in the services industry has also seen an increase of 7.7 percent since 1992. Health care research involvement, however, is the only industry that reached its all-time high in 2011 at 27.5 percent. This number is comparable to consumer durables but still significantly lower than consumer non-durables, services and business-to-business.

Room for everyone

Tracking the usage activities of client-side researchers over the past 20 years has presented an opportunity for *Quirk's* to explore emerging trends, dying breeds and hot-button issues in the industry in hopes of bringing our readers the most relevant content possible. If the past two decades are any indication, it seems that regardless of what next big thing is on the horizon there is – and will continue to be – room for everyone and every discipline. | Q

> pharmaceutical research

By James E. Heasley II

Two audiences, one goal

Using patient profiling to improve the pharma buying process

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snapshot

How research can help pharma marketing teams find the most effective ways to communicate a product's benefits to physicians and their patients.

The marketing of any product begins with the identification of a need. That is, marketers seek out a place for the brand – a position that will differentiate it from the other possible choices available to the customer through the fulfillment of a need that is currently not being met by competitors. This is the fundamental goal of all marketers, including those attempting to sell their products to physicians and patients in the pharmaceutical marketplace.

Once one or more unmet needs have been identified, marketers can then tailor their efforts toward describing their product's benefits in a way that fulfills those needs. This process, however, is not a simple one and requires developing a careful understanding of both physician and patient behavior that can then be built into an actionable strategy and a set of supporting tactics for the product.

One of the key weak points in these efforts is rooted in the clarity with which a given brand's benefits are linked to the identified unmet needs. This process is especially difficult for marketers when physicians are the target audience. Physicians represent a unique challenge for marketers in that, unlike other consumers, they are making a choice for other people rather than themselves. Thus, marketing teams must focus on multiple sets of potential needs (the physician and the patient) and then find the most effective way to communicate their product's benefits in that context. The goal of this article is to describe how to enhance this linkage of benefits to needs through improving the way that marketers communicate to their customers.

A bit of a misnomer

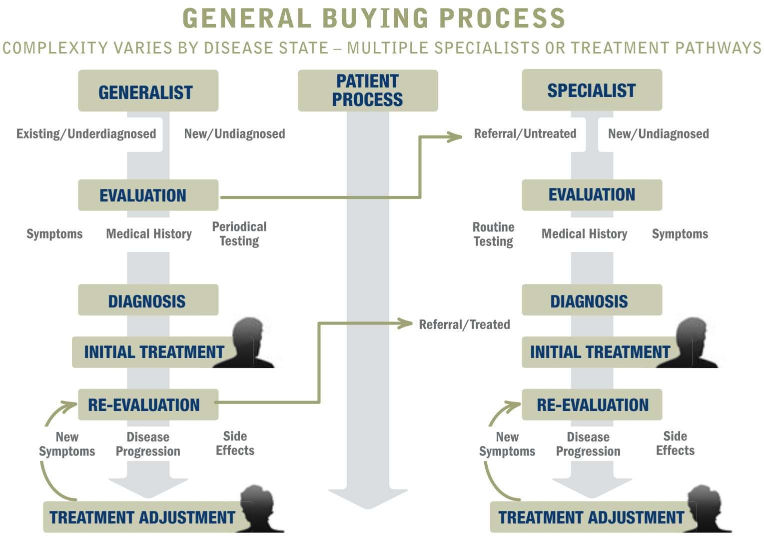
In the pharmaceutical industry, the buying process is, at its heart, a way to characterize physician behavior with regard to how decisions are made when diagnosing and treating patients. The term itself is a bit of a misnomer given that physicians do not buy products but rather prescribe drugs (and other treatments) for their patients who are the ultimate consumer. The term has, however, persisted as part of the common industry lexicon and is used to reflect both the decision-making process used by physicians and, in some cases, needs communicated by patients.

The only way to effectively characterize the buying process is to engage in marketing research with the customer. While this is done through both qualitative and quantitative methodologies, the former allows for a more in-depth and meaningful assessment of how and why treatment decisions are made at various points in the process. Regardless of the specific methodology used to gather the data at hand, all buying processes employ a similar series of questions to gather data that are utilized to populate a decision-tree model. The key goal from the marketer's point of view is to identify explicit or implicit factors that influence decisions about if and/or how a given product might be utilized. These are often characterized as points of leverage where unmet needs among either or both the physician and patient population in question are marked on the evolving treatment map.

A buying process decision tree will often start with a description of how patients typically present to the physician with the condition in question and then move through the diagnostic and treatment process. This will differ according to what type of specialist is involved, especially since the presentation of the undiagnosed and treated patient to the primary care physician is often quite different than the presentation to a specialist. Some of the more advanced methodologies will also include a similar evaluation carried out with patients and then melded with the physician-based model.

Figure 1 shows the fundamental flow of the physician buying process at a very basic level. Note that there are multiple points at which physicians will make decisions about treatment selection - the primary opportunity for which will often be at the time of diagnosis and at points where treatment is adjusted according to the development of new symptoms, disease progression, side effects related to specific agents or other factors. The ultimate complexity of an actual model is entirely dependent on the disease state in question. It may involve multiple specialties, treatment pathways and other factors unique to that particular situation.

Figure 1



Exploit areas of unmet need

Capturing the basic buying process allows brand teams to exploit areas of unmet need, also referred to as leverage points. Once these areas have been identified, common practice is to seek out the points of "best fit" for a particular brand. This is usually done through the explication and linkage of the brand's benefits to the unmet needs uncovered at various points within the buying process. Dosing, for example, is often a focal point of unmet need. In the context of an oral product for a disease state where agents are typically dosed with a frequency of two or more times per day, reducing that frequency to once-a-day might well be a key unmet, assuming all else is equal among the competing products in that category.

The key facet of this approach is the assumption that a set of product features/benefits can be identified and sold to physicians in a way that allows them to simply plug the new drug into their treatment algorithm at one or more of these leverage points. The fundamental problem with this approach, however, is that physicians do not necessarily "buy" drugs for their patients based on a set of particular product-related attributes. Rather, they individualize treatment according to their assessment of a patient's condition and then select the agent they consider to be the most appropriate for the circumstances at hand. In this way, the profile of the individual patient drives the selection and use of the treatment rather than a list of drug benefits that physicians would otherwise be forced to find some way to incorporate into their perception of when to use Product A versus Product B.

Pharmaceutical marketers know this to varying degrees and they often attempt to couch the benefits of their particular product in terms of a patient type, but this is often done as a last step rather than as an integral part of the overall product positioning and message development process. As a result, physicians are often left to make their selection among various options based on one or more perceived product benefits that do not always clearly match the perceived needs of individual patients. This is an obvious disadvantage when there are multiple similar agents within a class all vying for the same patient. A well-designed patient profile that is developed and evolved throughout the creation of a brand's marketing strategy (positioning) and tactical implementation (messaging, creative concept, visual aid, etc.) can package a drug's benefits to highlight exactly where and why one product should be used instead of another.

Portrait of a patient

The ideal patient profile contains a portrait of a patient that clearly identifies that individual (and therefore all others with similar characteristics) as a good candidate for the agent in question. It is created through a process that starts during or soon after the brand's positioning development and may be evolved during the creation of the drug's core messaging and subsequent tactical marketing materials. Currently, many profiles used as part of detail aids and other sales materials are often hasty constructions created after the fact during the "creative process" (e.g., created by the ad agency with little or no input from actual marketing research). Unfortunately, it is unusual that such profiles are developed and evolved as fundamental to the positioning and messaging phases of the process, thus wasting a unique opportunity to weave the patient profile into what becomes the ultimate brand image.

In practice, most teams/agencies use patient profiles to highlight the benefits of their product by simply showing a picture of a "patient" and highlighting some facet of their illness that the product in question is seen as treating most effectively (e.g., the chronic obstructive pulmonary disease [COPD] patient with frequent exacerbations related to a product indicated for the reduction in exacerbations). However, this offers only a minimally-effective approach since it merely highlights the indication for the brand in question and does little to specify a fit for the product within the overall buying process. Thus, it does not take the most effective advantage of previously identified leverage points. A further downside to this type of patient profile development is that customers eventually become dismissive of the overly generalized profiles, which reduces their effectiveness as tools for communicating how and where to use the product in question.

It is understandable, however, that both marketers and agencies often favor these more general profiles. There is an embedded concern that by developing what they perceive to be more narrow profiles, marketers may well be leaving other patients – and opportunities – up for grabs by the competition. While this may be a real concern in some instances, it is often driven by a lack of understanding regarding how effective patient profiles can become part of the brand's positioning and messaging rather than mere descriptions used as part of the final detail aid or other promotional materials.

Built through discussion and feedback

Both qualitative and quantitative research can be employed in the effort to test and refine effective patient profiles. Overall, the qualitative process is usually key since profiles are built through discussion and feedback from physicians rather than from data gathered from quantitative surveys. This is especially important during positioning, where brand teams are exploring which product features represent potential benefits versus potential liabilities. As the benefits are identified as important to physicians, it is possible to determine the core outline or sketch of the patient type or types who would be likely candidates for the product. Ongoing research is then used to fill in the sketch and develop a full profile that may consist of one or more "patients," each of whom can be used to characterize a particular facet of a drug's benefit or provide direction for linking the benefit to different leverage points/unmet needs in the buying process.

An actionable patient profile typically consists of at least three fundamental characteristics. First, the profile must identify a patient with real and recognizable disease attributes that reflect the realities of treatment within the given disease category. It cannot be a vague snapshot that does not coincide with the type of patients that physicians commonly see in their practice (e.g., a COPD patient profile should not be based on a 45-year-old mother from the suburbs who appears otherwise

Figure 2

Patient Profiling Research Identifies a Number of Possible Second and Third Line Opportunities:

Patient Profile
2nd Line Treatment

Patient is a 67-year-old male diagnosed 3 years ago with CLL

Initial diagnosis
- Rai stage II

Treatment history
Treatment initiated when developed bulky disease

Regimen 1
- First line treatment with FCR for 6 cycles
- Partial response was obtained
- Durable response lasting 8 mos.

Disease progressed

Patient safety concerns
PS status = 3

Adverse effects
- Recurrent viral infection
- History of neutropenia

Concurrent treatments
- Antiviral agent
- Supplements

Current status
- Patient progressed to Rai stage III with bulky disease
- Patient relapsed 9 mos. following FCR treatment

Physician preference
- Second line treatment with bendamustine
- Concerns regarding toxicity

Patient Profile
3rd Line Treatment

Patient is a 72-year-old male diagnosed 1 year ago with CLL

Initial diagnosis
- Rai Stage II with B-cell symptoms

Treatment history
Patient initiated treatment 1 mo. following initial diagnosis

Regimen 1
- First line treatment with FCR for 6 cycles
- Partial response for 4 mos.
- Developed Fludarabine-related toxicities

Regimen 2
- Second line treatment with Arzerra for 6 cycles
- Partial response for 9 mos.

Patient relapsed 10 mos. after completing Regimen 2

Patient safety concerns
PS status = 3

Adverse effects
- Prior infection with febrile neutropenia
- History of lymphadenopathy and anemia
- Enlarged spleen

Concurrent treatments
- Antibiotic
- Supplements

Current status
- Patient progressed to Rai stage III with bulky disease

Physician Preference
- Possible treatment with alemtuzumab or bendamustine
- Similar efficacy to bendamustine with lower side effects

healthy in an image). Likewise, it must contain enough information about the patient's history of treatment so that the physician can fully understand where the patient stands within the overall treatment flow.

Second, the profile should be consistent with describing the disease characteristics in such a way that the benefits of the drug in question fit with the apparent needs of the patient.

Third, the profile should provide clear direction to physicians so that they quickly understand the link between the patient, the product and when it would be most appropriate to use that drug instead of another possible choice at specific point in therapy – in other words, during the detail it should prove immediately apparent to the physician that the product in question will prove beneficial to the patient in the manner desired by the brand team (the leverage point).

The baseline profile should begin to emerge during positioning research and this ought to be used during message development as a way to guide the creation of the brand story. This is not to say that the product story should rely on the profile but rather that the two should be interwoven and act in a mutually supportive way.

Once the baseline messages have been created, initiate a specific qualitative study focused solely on creating the profile or profiles that will be used as part of the brand's marketing materials. The best-case scenario for this type of research is a dual-phase process that includes a first-phase brainstorming session using small focus groups (four to six physicians) followed up by a second phase of individual depth interviews.

In this second phase, the profiles are refined in combination with the product story and the process may be somewhat similar to a white-card visual aid test. The output from this research is then converted into various marketing materials, such as a detail aid, which are pressure-tested in research once again to produce the final, finished product.

This scenario is the most useful because it affords the team time to explore options for understanding the specific attributes of patients fitting the leverage points identified in the buying process. Time is, of course, the enemy of all marketers and it is often necessary to use a shorter version of the process (such as dropping the brainstorming groups). If the team has taken to heart the value of developing profiles, however, there should be plenty of opportunity to incorporate some elements of the process in later stage research.

Outline for a product profile

The following provides the basic outline for a product profile that is created and evolved during the development phase of brand positioning and messaging. Although it is a hypothetical

example, it is based on real-world experience in developing such models.

The product: A new biologic agent for the treatment of chronic lymphocytic leukemia (CLL) that is similar to several others on the market but with a somewhat different mechanism of action (MOA). The agent shows an adverse-event profile similar to other first-line biologics but does not appear to cause serious infections. Phase III clinical trial data suggest that the product might prove effective for those patients who have progressed after first-line therapy with a regimen containing one of the similar agents (the study patient population contained a range of patient types, including a number who had been treated with prior regimens containing one of these agents).

The supposition: Based on the trial data and potential leverage points identified from the buying process, the brand team believes that the agent could be a viable second- or third-line agent, especially given that the FDA indication is not entirely clear on its placement in the overall treatment paradigm.

Physician response to the product: Hematologists/oncologists exposed to the product profile, positioning and messaging, however, seem to believe that the new agent could be of value in a "salvage" setting when few other choices are available. There is some concern about using an agent with a similar MOA following the failure of another agent in the same class. They further note that the Phase III trial population was not entirely made up of patients who were exposed to one of the other similar biologic agents, thus somewhat devaluing the idea that the agent would be an appropriate follow-on therapy.

The patient profile: Through qualitative marketing research with physicians, several possible patient profiles are developed that very specifically highlight characteristics of the disease and subsequent treatment. Particular attention is paid to understanding what physicians would need to see in a product used in the second and third line and the specific patient or drug characteristics that would assuage their concerns regarding following agents with a similar MOA. When combined with the brand's messaging, the profiles guide physicians toward thinking about the new agent as a useful choice in the second or third line following the failure of the similar agent used in the first line. The profiles in Figure 2 represent an example of the level of detail that is often required to achieve a close fit with a given product (especially in complicated treatment areas such as oncology).

Considered integral

The development of actionable patient profiles should start as early as possible in the marketing process and be considered integral to positioning and messaging so that the profiles themselves become a part of the brand story. While simplicity is often desired in the marketing process, a fully-formed patient profile, or set of profiles, that speaks to the physician in their own language will often go a long way toward selling the benefits of a product in a way that maximizes its potential market share. | Q

health care research

The devil is in the detailing

Doctors prescribe the best ways for pharma reps to sell to them

By Patti Kaiser

A novel may not always be the best point of reference for a real-life professional challenge; however, the situations facing pharmaceutical sales representatives bring to mind some of the frustrations confronting the characters in Joseph Heller's *Catch-22*. The WWII airmen in Heller's novel follow the rules and strive to complete their missions so they can go home but illogical and inescapable rules inevitably frustrate their efforts. They can't fight "catch-22."

Dictionary.com offers a definition of a catch-22 as, "a frustrating situation in which one is trapped by contradictory regulations or conditions." Though pharmaceutical sales reps are not facing the horrors of war, they, too, have their own set of catch-22 situations, which can frustrate their efforts to familiarize physicians with their products. The following list is certainly not exhaustive, but highlights a few of the situations that "catch" sales reps each day.

Situation: Physicians are busy professionals who do not have time to study the details of every new product or changes to current products. They rely on sales reps to provide them with pertinent, up-to-date information.

Catch-22: Physicians are busy professionals who do not have time to talk with pharmaceutical sales reps.

In one-on-one interviews and in focus groups, physicians stress the importance of both of the issues above. Pharmaceutical sales reps are an important source of new-product information, particularly for physicians whose days are jam-packed with patients and are unlikely to take part in clinical trials, or have no research institutions nearby.

"As a physician, you don't have time to know everything … Drug reps are essential in that regard, to expose you to new things that come onto the market."

But the same time restraints that prohibit exhaustive study of the drugs they prescribe also limit their availability to talk with sales reps. Reps are all too familiar with the scenario of catching doctors in the hallway and racing to communicate their intended message in 60 seconds or less.

"I don't have time to stop and talk if there's nothing new."

Situation: Physicians insist that sales reps offer specific reasons why their product is better than other companies' products for the same therapy area.

Catch-22: Physicians insist that sales reps talk only about their own company's products rather than bashing the competition.

In looking at sales-aid data,

snapshot

Drawing from candid physician responses during research interviews, the author offers dos and don'ts for the pharmaceutical sales process.

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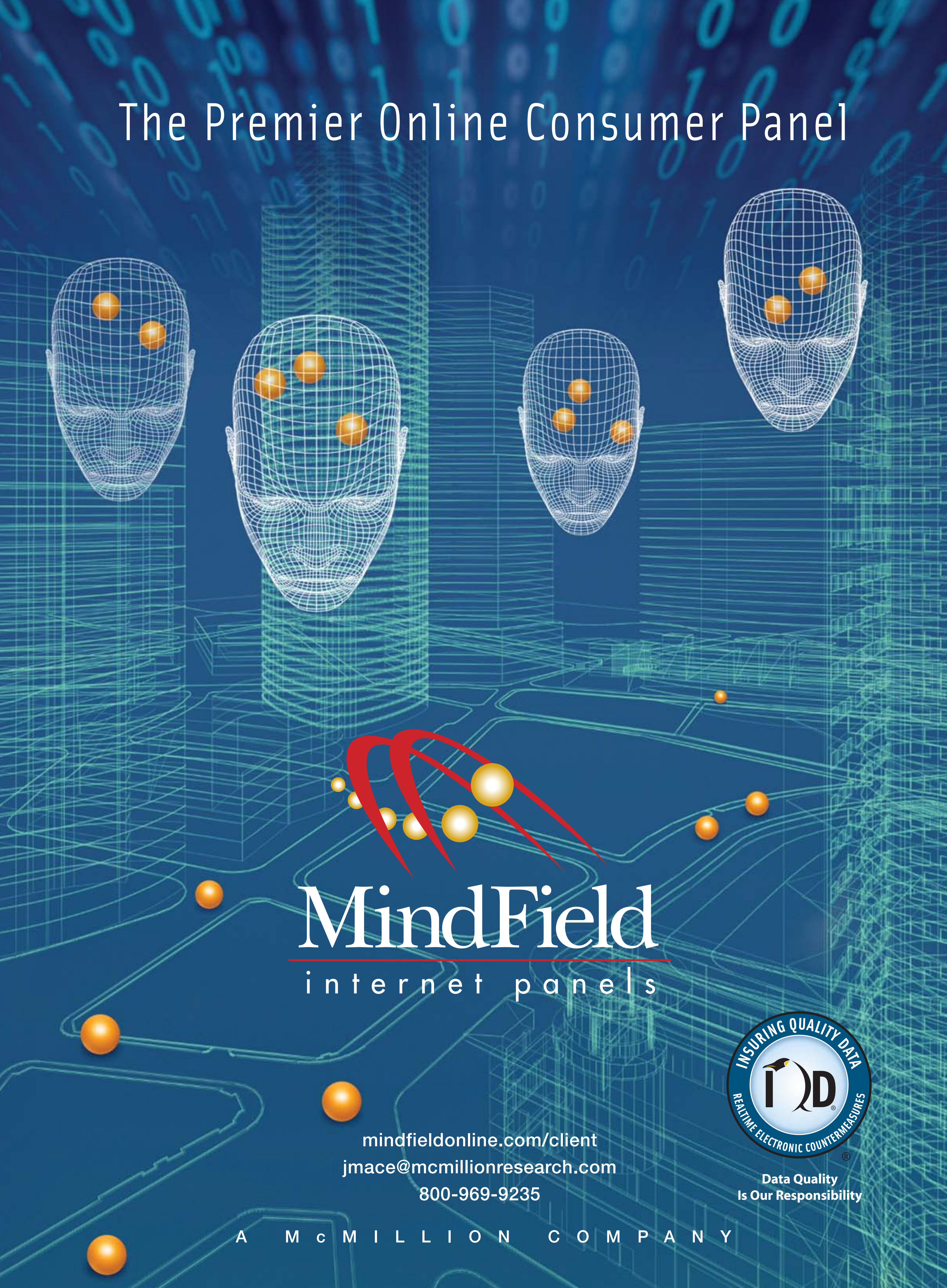
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physicians consistently ask for head-to-head data. They explain – understandably – that they need to see measurable differences between medications to help them make educated choices for their patients.

"I want to know the head-to-head data - I'm interested in something that differentiates these medications."

Reps don't always have head-to-head data to share but when they do have it, they have to be careful not to knock the competition. Physicians are adamant that they do not want to hear sales reps make negative comments about products from other companies.

"I think they need to stick to their own product and not bad-mouth or say anything about the competition. That starts things off on a very bad note in my office."

Situation: Physicians often find memorable visual aids helpful in learning new information quickly.

Catch-22: Physicians hate product sales aids and don't want to look at them.

Many physicians appreciate the simplicity and clarity that an eye-catching illustration can bring to the presentation of complex materials. During a lightning-fast detail, they are often more likely to remember a colorful graph than a block of text.

"If you give me a picture or diagram pointing out where things are and what things are, it's very helpful to me to not only keep my attention but to explain."

No matter how attractive or organized sales aids may be, many physicians simply do not want to see them. Judging by their self-described reactions, many physicians put up their guard as soon as they catch sight of a glossy detail piece – it provides a red flag that this smiling, friendly-looking person is about to try to sell them something. Even if that something is a product that they know and trust, no physician wants to feel persuaded by a sales pitch.

"I don't like seeing the flashy cards ... I don't know any doctor that likes sales aids."

There is one "catch" that can work in a sales rep's favor:

Situation: Physicians strive to use only the medications best-suited to their patients' needs and base their prescribing decisions on education, input from medical colleagues and clinical experiences.

Catch-22: When choosing between medications that are equally effective, safe and affordable, physicians are likely to favor the products presented by reps who have been helpful and informative.

Physicians are professionals. They have spent years learning how to best treat their patients' conditions. They have taken an oath to use their abilities and judgment to the benefit of their patients. Perhaps understandably, many are not interested in getting prescribing advice from someone who did not go to medical school.

"I went to school. I did this work. I know the patient, so what drug I choose is going to be the one I think is the best one."

Physicians are also people, and like most, are likely to spend more time listening to someone they enjoy being around, someone they consider a friend. They are also likely to prefer doing business with those friends whenever it is appropriate.

"It's a business and it's a relationship business. You'd never shortchange a patient but when all else is equal, you're going to use the products of people who seem to take an interest in your practice."

While this last "catch" is good news, sales reps must deal with ever-increasing restrictions on their options for making use of company resources to build relationships with physicians. What can pharmaceutical reps offer physicians' practices that will be valuable and memorable but will not cross the boundaries set by the PhRMA guidelines? Serious limits on gifts with any monetary value are going to force reps to focus more than ever on the personal skills that are the true basis for their effectiveness, not only as salespeople but also as partners and useful resources for physicians' practices.

In research settings, such as one-on-one interviews and focus groups, physicians are not at all shy about expressing their opinions on what makes a pharmaceutical sales rep valuable to them:

Relationships

Physicians may not have gone into

medicine to make friends but they are more inclined to take time out of a busy day to talk with someone who has taken the time to get to know them, someone they recognize as colleague who can help them serve their patients. Sales reps who show an interest in the practice, who ask questions - not only about prescribing habits but also about family, hobbies, sports - those who get to know the physicians and the staff are, in turn, more likely to be known and appreciated by those in the offices they visit.

Respect for their time

All sales reps know that time is NOT on their side when it comes to trying to see physicians. There is never enough time for them to do what they need to do. Physicians spend their days trying to squeeze in enough time to see their scheduled patients and they particularly appreciate sales reps who take notice of just how busy they are when they call. Being considerate enough to say, "I'll come back later," may buy a rep more time with a physician another day.

Respect for the staff

Physicians can be very protective of their workday "family" and expect sales reps to treat the office managers, nurses and PAs with courtesy and respect. In addition to making a favorable impression on physicians, taking time to get to know the office staff broadens and strengthens the overall relationship with a practice. Having friends in the front office may provide opportunities for discovering new ways to serve the practice. Reps may also benefit by taking time to familiarize staff members with their products, giving a full-office detail rather than focusing only on physicians.

Reliable information

Whether they like it or not, physicians rely on sales reps for information about their products. Because physicians are always pressed for time and they regularly receive information about multiple products from a variety of salespeople, they expect reps to provide updates: thoroughly but quickly; without bashing the competition; that will differentiate the product; and in a way that assures them that the rep is NOT trying to tell them how to practice medicine!

Focuses on their sales force

Pharmaceutical companies make regular use of marketing research to test sales materials, hoping to maximize the effectiveness of the information about their products. But these companies can also benefit from research that focuses on their sales force. One-on-one telephone interviews, or even small-group conference calls, can be worked into sales reps' busy schedules, to help find out how materials are being used, what practices and attitudes contribute to the success of top performers and what might be lacking in the approach of the lower performers.

Increased familiarity with the day-to-day experiences of the sale force can help managers identify training issues and potential improvements in sales tools that might help keep reps from being caught in some of the frustrating situations that confront them. | Q

health care research

Watching and asking

Fusing ethnography and interrogational research into a new modality for health care research

By Peter Simpson and Lynn Ford-Somma

Like other professions, market research is constantly evolving and this is no more evident than in the area of health care research. While traditionally the industry has relied on interrogational research of various standard types to understand motivations and behaviors, in recent years it has become clear that a purely interrogational approach does not always deliver accurate and reliable information about past events or unconscious processes.

New data collection techniques are becoming increasingly available to researchers ranging from cutting-edge non-invasive neuroimaging that has radically revised our understanding of brain processes and emotional functions to expanded use of technology for data collection using the Web, digital recordings, eye-tracking and various devices such as iPads.

Recently, the trend in health care is a move toward more observational methods with the intent to get closer to "reality." So we have seen an increasing emphasis on ethnography, audio/video recordings of patient visits with physicians and other techniques such as video diaries that presumably bring us closer to the truth.

While this is a significant step in upgrading research from asking about mental processes to observing them, there are also inherent limitations in these approaches. Observation without subsequent interrogation can be misleading. What is seemingly so obvious may mean something entirely different when put into a broader context.

With all the options available, the challenge today is how to use an integrated approach to maximize value and produce impactful results. How might an integrated approach be used in health care research?

- to better understand the patient journey from diagnosis onward;
- to understand how treatment decisions are made and in the context of rational concerns such as insurance/cost, social-psychological barriers, etc.;
- to better understand and potentially identify physician and patient segments;
- for program development in any number of areas such as compliance/adherence, disease management, patient education or even improving customer service; and
- for positioning and messaging research.

In bringing together watching and asking, we have three main

snapshot

Fusing ethnographic and traditional research methods can help health care researchers better understand patients' viewpoints, uncover how treatment decisions are made and develop more effective positioning and messaging strategies.

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types of modality to consider: interrogational research - qualitative or quantitative Q&A; observational research - in which we observe people and processes as they interact in the real world; simulation research - in which respondents are placed in a situation which resembles real life.

Traditional interrogational research includes all the standard (and not-so-standard) forms of research that ask respondents to articulate their attitudes and behaviors and occasionally their emotions. Surveys, in-depth interviews and focus groups are the most common forms of this research. This type of research is most effective in understanding rational reasons for making certain decisions. For example, in health care it could be whether the patient has health insurance or whether particular medical services are available in a geographic area. In an integrated approach, this research could be used to understand the contexts in which the physician or patient make decisions as well as identify general attitudes and behavior.

Observational research or traditional ethnography is usually carried out by an anthropologist with a video camera and a notebook observing the minutia of someone's day. Indeed this approach has very tangible value, for example in understanding how patients manage diet and insulin with diabetes, or the needs of physically-challenged patients. However, advances in technology have expanded our observational options and in many ways enhanced the value of observational research.

Not all ethnography needs to be carried out in person, which has the added value of removing the ethnographer from the equation. Simple and miniature digital recording devices make it possible to, for example, record physician-patient interactions in a medical practice without interference from the researcher, or a patient's experience at the pharmacy counter. This has the added advantage of expanding the geography that can be covered by traditional ethnography and potentially reducing incurred travel costs. The same trends in miniaturization and mass production now make it feasible to provide respondents with a Webcam to record their own daily activities and keep video or photo diaries.

Nor are all observations visual. For example, patient respondents can be provided with Bluetooth-enabled accelerometers that measure their physical activities and sleep patterns remotely in studies that need to determine the frequency and intensity of patient activity.

Blog monitoring and social media monitoring are also observational. Monitoring this unscripted activity can provide real-time information on what is of most concern to the target respondents, whether they are patients with a rare and potentially serious health condition or members of a health insurer discussing their customer experience.

Simulation research techniques might be considered when there are considerable challenges in observing the specific behaviors of interest. They may be of a very personal nature, or occur infrequently or unpredictably. There may not be time, or budget, to overcome these challenges in field observation.

Simulation research can include setting up situations that resemble real-life experiences. For example, such research might include simulating the patient's experience in a waiting room by renting a physician's office, displaying patient education or promotional materials and observing patient behavior. Another type of simulation research might involve using actors to portray either patients or physicians in a simulated patient/physician interaction. This might be accompanied by traditional interrogation techniques to assess the overall experience. Simulation research, while not real, offers an advantage over observational research by providing a more controlled setting and allowing various stimuli to be manipulated to test different reactions.

Combining multiple approaches provides value

While each of these types of research approaches offers value in and of itself, combining multiple approaches provides value beyond the sum of the parts.

Consider a specific example where observation, simulation and interrogation can be combined. In this case the challenge is to understand how physicians manage patients to accept and be compliant with a drug that may generate significant concerns in the patients' minds.

As a first step a significant number of physician-patient interactions where this treatment possibility is likely to arise might be recorded; let's say 100 such appointments would provide a sound base. In analyzing the results, the Hawthorne effect (that observing a behavior modifies the behavior observed) would need to be considered. In this case, while the purpose of the study is blinded, physicians and patients know they are being recorded and may be more conscious of their behavior. It is also possible that either the physician or the patient may be more reluctant to have as open and honest communication as they might have otherwise. This is where enhancing the research with traditional interrogation such as a follow-up interview is helpful. This gives an opportunity to ask a physician why they did not offer the apparently most appropriate treatment or discover that the patient who said they would try a new drug has, in fact, no intention of actually doing so.

Having completed this stage, the next step might be to identify more optimal physician-patient conversations. How can this be developed further? This is where simulation research can be appropriate.

In this case physicians are recruited to come to a research facility for an in-person interview. Partway through the interview a case study is presented complete with appropriate clinical information (such as lab results or imaging). When this has been absorbed by the physician a carefully briefed actor is brought in, without prior warning, and the physician is asked to assume they are a patient and to, for example, explain the diagnosis and treatment options. While this simulation approach is not real it has the advantages that the physician respondents have no time to develop strategies to make themselves appear in the best light and, as the actor and the case study are completely controlled, it is possible to run the same scenario or potentially more than one scenario over and over with different physicians.

For health care companies, such as insurance providers, combined modalities could be used to understand member engagement and develop outreach programs. For example, members with newly diagnosed serious conditions could be followed using video or photo journals as they navigate the health care system. This could be combined with traditional interrogational techniques and finally, simulation research could be added to test ways of improving the member experience.

New understanding

The frontiers of understanding the working of the human brain are being rapidly expanded and this new understanding is impacting market research in many ways. Useful discoveries include:

- The mechanism of memory formation and the role of emotion in laying down long-term memory records.
- The existence of hardwired heuristics (unconscious decision-making processes) that, for example, apply pressure to the conscious brain to conform to group norms.
- The separate processing of input by the cerebral cortex (the conscious rational mind) and the cerebellum (the limbic or emotional mind), emphasizing the necessity of understanding – and messaging to – both sets of mental processes.

Psychoprofiling respondents adds another layer of understanding to respondent behaviors. For example, some physicians go to great lengths to ensure that their patients get the treatments they wish to prescribe and devote considerable effort to supporting them in navigating the reimbursement system. Others will be very forthright that this is "not their job" and may ignore the issue completely. Psychoprofiling not only helps understand what leads to these different points of view but also helps to predict which physicians will adopt either position, or something in between.

As another example, consumers/patients who exhibit certain heuristics with respect to obtaining and maintaining personal assets will be very resistant to spending on health care costs and make apparently irrational choices between treatment and retaining income. Overlaying this information enables the research to understand how these factors influence health care behaviors.

Multimodal projects result in incredibly rich data but often in non-standardized forms – video, audio recording, artifacts, still pictures, projective exercise results, psychoprofiles and transcripts. Not only are there multiple forms of data but there tends to be a lot of it! This requires a higher level of analytic sophistication than with traditional single-mode research. While there are software packages for organizing multimedia output, they not in themselves analytical.

People remain vital at this stage.

There are aids such as computer linguistic analysis models and psycholinguistic interpreters, but in the end, research is analyzed by people, and agencies need more well-rounded and more versatile staff than ever before to distill the many data down to conclusions and actions.

Analysts, researchers, linguists and ethnographers must collaborate to interpret the output and its significance to the business issues at hand. This type of approach tends to throw up all manner of fascinating output which might have great business value outside of the core purpose of the study, or no value at all beyond being plain interesting. Organizing the conclusions and expressing them succinctly and in appropriate categories with supporting video-audio-photographic evidence requires considerable discipline and teamwork.

Some recommendations

For clients and agencies who are considering a multimodal solution with a mix of interrogation, observational and stimulation research, here are some recommendations.

Clients need to keep in mind that:

- This type of research takes longer than solely interrogational research.
- They will have less immediate control over the activities of the researchers and therefore need to exercise appropriate strategic control over the project and a close relationship with the project leaders.
- The final results will not be determined from any one modality and will not emerge until the analysis is competed. A traditional topline is typically not possible in this type of work.

Agencies need to:

- Develop staff with a broad worldview and an understanding of multiple techniques, social and even political issues and the basic psychology of the human mind.
- Develop working practices and investigate ways to integrate data in different forms.
- Promote strong team ethics.
- Use rigorous "challenge" and quality-control methods to ensure that the more complicated analysis leads to a clear, unambiguous and, above all, relevant, result.

Upgrade in the insights

While not a magic bullet and it is not suitable for all projects, observing processes in real or simulated circumstances offers a tremendous upgrade in the insights and actionability of research. Observation needs to be integrated with more traditional interrogational research in a skilled and thoughtful way and its value to the overall project critically assessed. One contribution of significance is to challenge and overturn erroneous conclusions that can be drawn from traditional research because respondents give answers based on what they think should be the case rather than what actually is the case. In this multimodal research approach there are no "ethnography projects" as we have seen in the past, because ethnography and its relatives are means to end not the end themselves. |Q customer satisfaction research

Not very satisfying

Line managers explain why they don't see much value in satisfaction measurement programs

By T.J. Andre
and Jeff McKenna

While most most large and medium-sized businesses have implemented some sort of customer satisfaction or customer experience measurement program, the lack of impact of these programs on the day-to-day management of organizations is striking. Technological innovations over the past decade have given analytically-oriented managers much more sophisticated real-time reports and tools but we find that the actual benefits from these advances have plateaued.

For some historical perspective, let's look back on a decade of rapid change:

New CRM systems and powerful data warehouses have made it possible to solicit feedback almost immediately after customer transactions. The time and cost required to set up the data feeds to enable programs to trigger a feedback request, and later connect the customers' responses to account and transactional data, is a fraction of what we saw just a few years ago.

For example, in 2004 we set up a continuous feedback program for a national homebuilder, collecting responses at key points in the purchase and post-purchase process. All told, the company invested close to $200,000 to set up the necessary queries and links in the data warehouse to support the effort. Today, that would have cost $50,000, at most.

Automated data collection via online, telephone or mobile device has had a huge impact. Even old-fashioned pencil-and-paper questionnaires can be processed in seconds rather than the minutes needed for hand-transcription. We asked a long-time data collection vendor, Joe Post at The Research Partners, how he has seen the change. "Back in 2000, we had 80 percent of our customer satisfaction work by telephone; today it's 15 percent," he says.

Automated reporting delivers important data to the "people who need to know" in real time. Tables and charts that once required weeks to create, print and mail can be a simple keystroke away. Software applications are available to allow anyone in an organization to query the data to create custom crosstabulations and charts. Pivot tables in Excel, Tableau, SPSS and OpenOffice are just a few of the off-the-shelf solutions.

Overall, the past decade represents a huge advance in how companies listen to and engage the customer. But very

snapshot

Though widely used, customer satisfaction measurement programs are not fulfilling their promise. The authors draw on a survey of line managers to explore why and offer thoughts on how to improve their effectiveness.

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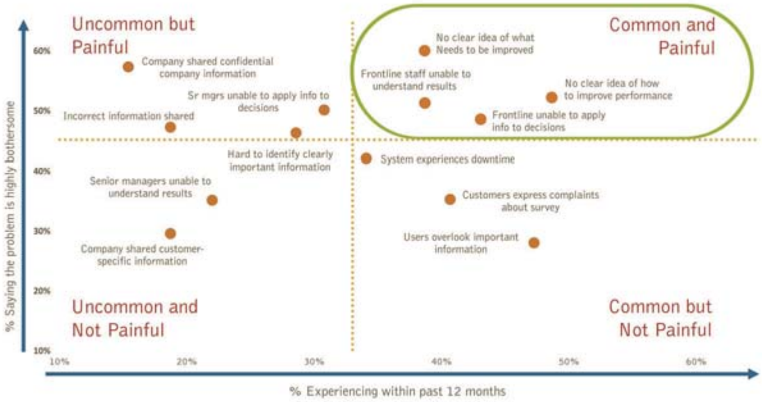
Figure 1: The Most Common Problems with Customer Experience Measurement Programs



Source: Chadwick Martin Bailey research among managers who are the internal customers of customer feedback measurement programs - April, 2011

little has been done on the other side of the equation to engage managers at different levels of the organization to improve the business as a result. It's very common, even expected, that companies today have a wide range of listening tools: customer feedback, social media, employee feedback, brand tracking, etc. Given these advances and, hearing from more customers, the number of companies facing the problem of translating all this data into real actions to improve the business is distressing.

Heard the same thing

Over the past several years, in hundreds of conversations across industries and sectors, we have heard the same thing consistently: Line managers are unable to use their customer experience measurement results to improve business outcomes.

Step back and think about that for a second. Thousands of companies spend tens, hundreds of thousands or even millions of dollars to collect, analyze and distribute the results of customer experience measurement programs. And then, line managers at all levels of those organizations say these programs don't help them take action to improve the business. Ouch!

These aren't just informal observations either – they echo a more formal study we conducted with 150 line managers in a cross section of companies and industries. In the study, we asked managers at all levels of organizations about their experiences using customer satisfaction results – what problems they experienced, how frequently and, for each of the problems they cited, how bothersome it was when they occurred. The results validated the common and very painful realities we have been hearing in conversations with the managers who use customer feedback programs.

More specifically, as charted in Figure 1, they complain that: they have no clear idea of what needs to be improved and no clear idea of how to improve; it's hard to identify the most important information; senior managers are unable to apply information to decisions; frontline staff is unable to apply information to decisions; and frontline staff is unable to understand the results.

Why so much pain and so much money wasted on deliverables that go unused? In a nutshell, it's because traditional programs are good at keeping score but bad at providing the support and enabling tools that help managers at every level act on the insights gained.

To quote one senior manager, "Getting insights into the hands of managers at the different levels of the organization in a way that is readily useful to them – that's what's needed. We don't want them spending their time analyzing data and reports. We want them managing toward business outcomes."

The source of this problem can be traced to the different mindsets that companies bring to their customer experience measurement programs and the strengths and shortcomings associated with those mindsets. You can categorize customer experience measurement programs as either analytic or data-centric or customer transaction-oriented.

The analytic or data-centric group is focused primarily on "keeping score" and the diagnostic analysis of data to make comparisons and identify trends. Programs that serve this mindset tend to provide lots of data, both to staff analysts and to mid-level

and frontline managers. Often managers find the information they get from these programs to be overwhelming. It's both the sheer volume of data and the need for additional analysis that often hinders managers from finding the meaningful conclusions. Further, they struggle to directly connect the data to actions that will drive improvement within their spheres of influence and responsibility.

The customer transaction mindset, in contrast, focuses primarily on customer relationship management at the individual or location level. Their programs tend to be focused on identifying and closing the loop on individual customer service failures. They are characterized by a sense of urgency and action to maintain strong individual customer relationships through proactive service recovery. These programs tend to be much weaker at enabling diagnostic analysis of systemic problems, whether at a branch, regional, departmental or corporate level. This can lead to a management dynamic of addressing individual symptoms over and over while the underlying diseases go undiagnosed and untreated.

Act on the insights

What is needed are tools that help line managers at every level act on the insights gained and enable senior managers to (fairly) hold their employees accountable for taking the actions that will have the most impact. The ideal customer experience measurement and management program would combine the strengths of each of these mindsets while overcoming the weaknesses. Such a program would be characterized by a real-time close-the-loop service recovery system while also providing the analytical horsepower and tools to allow managers (at all levels of the organizations) to easily see, diagnose, prioritize, plan and act on systemic customer experience issues.

Is having such a program even possible? And if so, can it be implemented at a reasonable cost? The answer to both these questions is, fortunately, yes. The measurement methodologies have long existed and the technology is available. What would have required a huge investment just a few years ago is available today for a fraction of that cost.

So if the elements of the solution exist and can be combined cost-effectively, why is there still so much widespread pain around the lack of usefulness of customer satisfaction measurement programs? Once again, it comes down to mind-set. Many customer satisfaction programs are built and managed by third-party vendors or by internal market research teams. These folks, despite their marketing jargon and positioning as "business partners," are in fact in the data business. And if you're in the data business you deliver data. It may be very impressively packaged and displayed, but it's still just data.

Those who understand, and most importantly commit themselves to combining measurement techniques with technology to build tools that directly facilitate and support management action - at all levels of the organization - are the ones who will change the game. | Q

customer satisfaction research

A more direct measure

Improving continuous improvement with maximum difference scaling

By Michael S. Garver

Customer satisfaction research gained widespread adoption in the 1990s by being aligned with a total quality management philosophy with a relentless focus on continuous improvement. No matter what level of performance the firm is currently achieving, a continuous improvement philosophy suggests that firms identify and prioritize ways to do better.

One of the main objectives of customer satisfaction research is to identify what product and service attributes should be prioritized for continuous improvement efforts, as suggested by customers in the marketplace. Practitioners need to know what attributes should be targeted for continuous improvement efforts and how those attributes should be improved.

Currently, most customer satisfaction researchers obtain attribute importance scores and relative satisfaction scores, then infer improvement priorities by examining both attribute importance and relative satisfaction data via performance-importance analysis (also known as quadrant analysis). Researchers have identified a number of issues and limitations with measuring attribute importance and satisfaction, as well as analysis methods used in conducting performance-importance analysis. These issues and limitations call into question the validity of inferring improvement priorities from this approach. As a result, a number of researchers now suggest that researchers should begin to directly measure improvement priorities instead of or in addition to using more traditional approaches that infer improvement priorities (Bacon 2003; Waddell 1999).

The purpose of this article is to put forth a new approach for directly measuring continuous improvement priorities within customer satisfaction research. A new application of maximum difference scaling is employed that can be used at a strategic level to identify overall improvement priorities or at a more tactical level to suggest specific improvement efforts. This article gives an overview of maximum difference scaling and its use in identifying continuous improvement priorities, followed by an empirical demonstration of this method.

snapshot

To perform better, companies need to know what's most important to consumers. The author outlines how to use max-diff to identify improvement priorities.

Popularity rapidly increasing

Maximum difference scaling (also known as best-worst analysis or best-worst conjoint analysis) has been around for the past 20 years, yet the popularity of this technique is now rapidly increasing every year. While leading-edge researchers have used maximum difference scaling in a variety of ways, the majority of research studies published in the literature have

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used maximum difference scaling (MD) to prioritize a list of attributes, with the most common application being attribute importance analysis. Chrzan and Golovashkina (2006) examined the most popular research methods for determining attribute importance and found that MD was the most valid and accurate research method for the job. While attribute importance has been the most popular application, MD can be used whenever researchers are struggling to get adequate variation in their results. MD may be a viable method when respondents "can't have it all." Customers make difficult choices every day with limited resources and MD is aligned with this reality.

To create a MD survey, a list of attributes would be entered into an experimental design plan, with the experimental design plan specifying which attributes would be compared in each MD question. Typically, four or five attributes are shown in one MD question and the customer is asked to choose the "best" and the "worst" item from the list. On average, depending on the number attributes, each respondent may answer between 10 and 15 MD questions. MD choice data are analyzed with counting analysis, latent class analysis or hierarchical Bayes. Typically, the results are then rescaled to ratio-level data, with the attributes scores summing to a total of 100.

Two different methods

This article proposes two different yet related methods for directly measuring and identifying improvement priorities - including both strategic improvement priorities and tactical improvement priorities.

Strategic improvement priorities

Before specific improvement plans can be created, the first step is to identify the attribute(s) that customers most want to be improved. In the strategic improvement priority stage, the researcher is looking for the general area of the firm's offering that needs improvement. For example, do customers want to see improvements in product quality, technical support or customer training? In this situation, the researcher designs the MD study so that participants choose the "most needed to be improved" and "least needed to be improved" attributes from a list of four to five product and service attributes.

When implementing strategic improvement priority analysis, the attributes would be the same as or similar to those attributes currently used in the firm's relationship customer satisfaction survey. The results from this analysis would be at the same level as the results from traditional performance-importance analysis.

Tactical improvement priorities

One of the biggest complaints by practitioners - How do we act upon the data? - is addressed in this stage. In typical customer satisfaction research, it is often difficult to know exactly how to improve an attribute once it is slated for improvement efforts. For example, if technical support is prioritized for improvement, which aspect of technical support needs to be addressed? Is it wait-time to talk with a representative, first-call resolution or the knowledge level of technical support representatives?

While there are methods to overcome this problem (open-ended comments, drill-down questions, etc.), most satisfaction research is not very effective in providing precise guidance of exactly how attributes should be improved.

Implementing the tactical improvement priority method, specific improvement efforts are put forth and then tested within MD. This method assumes that the strategic improvement priority has been utilized and the appropriate strategic direction of improvement efforts has been identified. Now, specific plans to improve the overall attribute(s) are put forth. Keeping with the example above, what aspect of technical support would you rather see improved? Would you most prefer to see "wait-time to talk with a representative" improved, "first-call resolution" improved or "knowledge level of technical support representatives" improved? Consistent with the strategic improvement priority method, the researcher designs the study so that participants for each MD question choose the "most preferred to be improved" and "least preferred to be improved" solutions from a list of four to five solutions.

Facebook as the research context

To empirically demonstrate the strategic improvement priority method, Facebook was chosen as the research context. The goal of the analysis was to identify those attributes that had relatively higher improvement priorities so that continuous efforts could be aligned with the needs of the marketplace.

To develop a list of strategic attributes, interviews and focus groups were conducted with avid Facebook users. Then, this list of attributes was shown to another group of Facebook users, whose feedback was used to refine the list, resulting in 18 attributes.

Implementing max-diff within Sawtooth Software's SSI Web software (version 7), the 18 attributes were entered into an experimental design plan, with five attributes shown per MD question. A total of 11 MD questions were asked, with each attribute shown with different attributes in each set. For each question, respondents were asked which of the five Facebook features (such as company profiles, status updates, chat) "most needed to be improved" and "least needed to be improved."

To be included in the sample, respondents were first qualified by responding that Facebook needed improvement efforts. In the final sample, 574 respondents were invited by e-mail, with a password-protected link to take the survey. From this activity, 538 emails were successfully delivered, with 212 respondents completing the survey. After cleaning the data, 203 respondents remained in the sample, for a response rate of 39 percent.

Results

After the data were collected, a hierarchical Bayes application of multinomial logit analysis was used to analyze the data, with the results being imported into SPSS. The mean scores from this analysis are included in Table 1. The top two strategic improvement attribute scores include privacy settings (10.6) and searching capabilities (9.4).

Table 1: Improvement Priority Analysis for Facebook Attributes

Strategic Facebook Attributes	Strategic Improvement Priority Score
Privacy settings	10.6
Searching capabilities	9.4
Promoting capabilities	7.5
Chat	7.1
Networking	6.8
Applications	6.6
Company profiles	6.6
Marketplace	6.1
Group pages	5.8
Pictures	5.0
Messaging	4.8
Games	4.6
Blogs	4.2
Status updates	3.6
Band profiles	3.5
Videos	3.2
Notes	3.1
Relationship updates	1.3

Given the relative magnitude of the improvement scores, privacy setting and searching capabilities would most likely be prioritized for improvement. Improvement scores for privacy settings and searching capabilities are significantly higher than any other improvement attribute score (p value <.05).

TURF (total unduplicated reach and frequency) analysis is a popular technique that optimizes a product portfolio to maximizes total reach to the marketplace. While TURF analysis has most often been used in a consumer retail context (i.e., what mix of brands will reach the most consumers?), TURF analysis can also be used with MD improvement priority data. For example, what three "improvements" would have the most impact or greatest reach of satisfying the marketplace? While this is a relatively new application for TURF analysis, it can help researchers prioritize improvement efforts.

TURF analysis results using the first choice method are included in Table 2. The results tell an interesting story. The analysis was run to determine what attributes would be prioritized for improvement if only two, three or four attributes could be selected.

Consistent with the overall results, privacy settings and searching capabilities are commonly identified in each analysis. In contrast, some attributes rise to the top that had relatively low rankings and improvement scores in the overall analysis. For example, chat is ranked fourth in overall results, but is prioritized substantially higher in TURF analysis. Pictures (tenth) and games (twelfth) and are ranked relatively low in the overall results, but are prioritized substantially higher in TURF analysis when three- and four-attribute combinations are examined. This demonstrates the usefulness of TURF analysis for prioritizing improvement efforts.

The average customer does not exist

Not all customers are alike in their preferences for improvement. In short, the average customer does not exist and improvement-based segments will deliver more insight into the marketplace. With this in mind, latent class cluster analysis (Latent GOLD 4.0) was used to segment the market based on their strategic improvement scores. After running a number of analyses, a three-segment model was determined to be the most appropriate segmentation model (i.e.,

Table 2: Improvement TURF Analysis	
Top 2, 3 and 4 Combinations of Attributes	First Choice Reach
Top 2 Attributes	
Chat & Privacy Settings	43.84%
Searching Capabilities & Privacy Settings	42.36%
Top 3 Attributes	
Chat & Privacy Settings & Searching Capabilities	57.14%
Chat & Privacy Settings & Pictures	52.21%
Top 4 Attributes	
Chat & Privacy Settings & Searching Capabilities & Pictures	65.52%
Chat & Privacy Settings & Searching Capabilities & Games	64.04%

Table 3: Improvement-Based Segments

Attributes	Promoters	Privacy	Searchers & Gamers
Privacy settings	9.1 (3)	13.0 (1)	8.9 (3)
Searching capabilities	8.4	10.6 (2)	9.2 (1)
Promoting capabilities	9.6 (1)	7.0	4.5
Chat	4.8	9.7 (3)	6.6
Applications	8.9	3.7	7.7
Networking	6.3	8.6 (5)	4.3
Company profiles	9.1 (3)	4.8	5.0
Marketplace	9.5 (2)	2.8	5.8
Group pages	6.6	5.1	5.5
Games	5.8	1.2	9.2 (1)
Pictures	0.7	9.5 (4)	4.8
Messaging	2.6	8.4	2.3
Blogs	6.0	1.6	5.4
Status updates	0.9	5.4	5.5
Band profiles	5.6	1.2	3.9
Videos	1.7	4.2	4.3
Notes	3.9	2.0	3.7
Relationship updates	0.6	1.1	3.4
Size of segment	40%	40%	20%

AIC, BIC, classification errors, segment profiles and segment size).

Table 3 contains the improvement scores directly measured by MD for each segment, along with the size of each segment. The smallest segment captures 20 percent of the sample, while the two largest segments both account for 40 percent of the sample. Each attribute improvement score is significantly different (p values $<.05$) across the three segments.

The three resulting segments are named according to their primary improvement priority, and include the following: the Promoters, the Privacy Guys, the Searchers & Gamers.

Clearly, the Promoters segment has a focus on improving Facebook's commerce-related activities. This segment places the highest preference on improving the promoting capabilities (9.6) of Facebook, followed closely by improving the marketplace (9.5). Both of these improvements are commerce-related. The next highest preferences for improvement include company profiles (i.e., also commerce related) and privacy settings.

The Privacy Guys place the highest scores on improving privacy settings (13.1) in Facebook. Without question, this segment's focus is on improving privacy settings. While all segments have relatively high improvement scores for privacy settings, this segment has significantly higher scores for this attribute. In addition, the privacy settings score is also significantly higher than the remaining attributes for this segment. It should be noted that pictures has a much higher improvement

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score for this segment, which is consistent with TURF analysis results.

The Searchers & Gamers segment place the highest preference on improving both searching capabilities (9.2) and gaming capabilities (9.2) within Facebook. This segment's preference for searching and gaming capabilities is also consistent with TURF analysis results. Their third preference for improvement is privacy settings (8.9).

Examining the three segments, some of the attributes have high improvement scores for all segments. For example, privacy settings and searching capabilities are relatively high on the list for all segments. This is consistent with the overall results and TURF analysis. In contrast, there are attributes that have relatively low average improvement scores for the sample, yet have high improvement scores for a particular segment. For example, improving gaming capabilities and pictures within Facebook are relatively low for the sample, but very high for individual segments (these also rank high in TURF analysis). Likewise, company profiles and marketplace also have relatively low improvement scores for the sample, but high for one segment in particular.

Absolute versus relative scores

Typically, MD scores are rescaled to ratio-level data where the scores of all attributes sum to a total of 100. This has long been touted as a benefit, since attribute scores can be directly compared to each other. For example, attribute A with a score of 20 is twice as important as attribute B with a score of 10.

The goal of this study was to identify those attributes that had the highest relative improvement scores, so that the firm could focus on those attributes that needed the most attention. Thus, relative scaling of MD results is justified for this study.

As of late, however, the relative nature of MD scores has been discussed as a limitation in certain research contexts (Bacon, Lenk, Seryakova and Veccia 2008). In response to this issue, researchers are putting forth and testing methods to determine the best way to obtain more absolute or anchored MD scores. While a variety of methods are currently being developed and tested, most of the absolute methods have respondents answer additional survey questions in addition to the MD exercise, which are then modeled to obtain more absolute MD scores.

At this time, the jury is still out on what contexts require more absolute scaling, as well as the best method for conducting this analysis. Because absolute scaling requires more respondent time and effort, as well as analysis time and effort, researchers need to put forth a solid case why absolute scaling is necessary. Future research is needed in this area to determine those situations in which absolute MD scaling is necessary, as well as the best method to implement absolute scaling.

Moving forward, if absolute scaling is deemed appropriate for measuring either strategic or tactical improvement priorities, then additional survey questions are necessary in addition to the MD exercise. For strategic improvement priorities, these survey questions need to determine whether certain attributes need to be improved. For tactical improvement priorities, these survey questions need to determine whether proposed solutions are preferred.

Directly measure

Currently, most customer satisfaction researchers infer improvement priorities by examining both attribute importance and relative satisfaction data via performance-importance analysis. Based on limitations and issues of this approach, this article proposed two MD applications to directly measure and identify continuous improvement priorities, which included the strategic improvement priority analysis and the tactical improvement priority analysis. | Q

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The passives are not passive

Why you should be careful with the Net Promoter Score

By John Goodman and Dennis Gonier

The Net Promoter Score (NPS) was introduced in 2003 by Fredrick Reichheld as "the one number you need to grow" to enhance profitability.[1] Since then there has been an ongoing debate about the utility of NPS, with Bob Hayes providing a good summary of the overall debate in his 2008 *Quirk's* article ("Customer loyalty 2.0").[2] TARP does not quibble with a willingness-to-recommend question as a strong indicator of customer loyalty and future repurchase intention. In fact, TARP first recommended using a willingness-to-recommend question in place of or as a supplement to a plain satisfaction or repurchase question in Quality Progress in 1992.[3]

There are, however, three difficulties with how the NPS treats those respondents who assign a score of 7 or 8 - a group Reichheld terms passive or benign. First, they are not benign - they spread negative word of mouth and are less loyal. Further, they are much more price-sensitive than customers who assign a 9 or 10 rating. Secondly, they often constitute a large part of the overall customer base and should not be ignored. If you have a strong brand with less than 10 percent detractors, your biggest opportunity is the passive segment, and NPS, by implication, is not very actionable. Third, the passives present a huge opportunity in that there are easy ways to move them up the scale to become advocates. For these three reasons they should not be ignored or even called passive.

Significantly less loyal

Passives are both significantly less loyal and very likely to spread negative word of mouth. In comparing the word-of-mouth behaviors of those assigning a 7 or 8 on a 10-point scale (or generally a 4 on a five-point scale, which also constitutes a major part of TARP's research)[4], the authors find that passives do indicate they tell several friends and associates about their experience. The numbers are usually 30-50 percent of the magnitude of those told about very good or very bad experiences but they are still significant contributors to the overall volume of word of mouth being spread about the customer experience.

The ambivalent experience related in passive word of mouth does the company no good and is

snapshot

Customers who are seemingly happy - or are at least not angry - deserve more attention than most companies give them, the authors argue. Despite their apparent satisfaction, these consumers could be poised to sow discontent with your brand.

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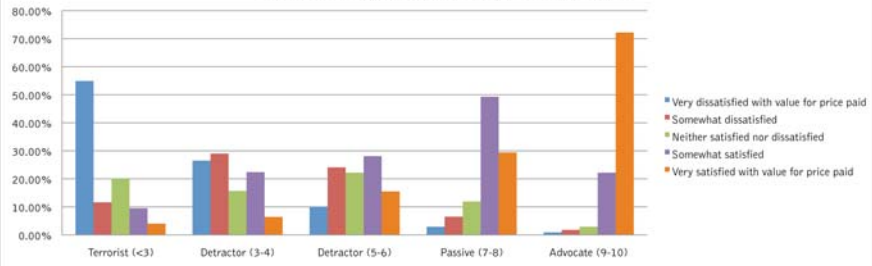
Figure 1: Appliance Manufacturer Example



usually at best faint praise or actually negative. Think about how you would react if someone came to you and said, "I just went to this restaurant and I'd definitely give it a 7." What you hear is them saying, "It was barely adequate," or "They didn't do a bad job." Would you rush right out to that restaurant? We think not.

Second, customers who give passive ratings, e.g., 7s and 8s or a 4 on a five-point scale, are generally significantly less loyal than those giving a top-box rating. In comparing willingness to repurchase against willingness to recommend, we find that passives are usually 10-20 percent less likely to remain loyal or intend to repurchase. In his example of T-Mobile's market in 2008, Hayes indicated that 7s and 8s constituted 37 percent of the total market. Interestingly enough, he also shows that their disloyalty (those highly likely to switch) was exactly the same for 7s and 6s and 5s.[5] We usually find that those customers who assign passive ratings have either had some sort of minor question or problem that was not even reported or they have had a completely uneventful transaction with no interaction with employees. As noted below, these situations can provide a significant opportunity.

Finally, passives tend to be much more price-sensitive. TARP has correlated ratings of satisfaction with price and value for price paid with willingness to recommend and found that customers who assign passive scores are significantly more sensitive to price and perceive significantly lower value for price paid. See Figure 1 for an example of a major appliance manufacturer (N = 1,300) where passives show a 40 percent drop in satisfaction with value for price paid vs. advocates who give a top-box 9 or 10 score. While this might seem tautological, it reinforces the point that passives are NOT passive.

Market leaders live and succeed in a top-box world. This correlation of mediocre recommend scores with ambivalence toward repurchase, value and price sensitivity was best characterized by the senior vice president of a major agricultural equipment company that charges a premium for its products. He said, "When someone gives you a 4 on a five-point scale, he's saying, 'I'll keep buying your product until

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someone else offers me a better deal.'" He then went on to say, "We don't want to compete on price, so a 4 or a 7 [on a 10-point scale] is not acceptable!" Similar views have been expressed by executives in leading retail, auto and insurance companies, all of whom live in a top-box world.

Detractors are vocal

We usually find that 20-35 percent of all respondents usually end up in the passive category. In most organizations, the detractors are vocal and submit many more complaints. Further, their problems are obvious and judged to be serious, placing the company's reputation and treasure at risk. On the other hand, the passives are often viewed as somewhat satisfied or even satisfied (as opposed to very satisfied). Their situation is not viewed as dire and is seen as a lower priority. If, in executing the NPS calculation, you drop out passives, you are ignoring a significant part of your market.

Further, the passives can be more easily affected. They have not had any serious problems with your product or service though many of them have experienced a minor problem or question. They are the group you are most likely to move to top-box advocacy. This means that provision of a low-effort value add can potentially move their ratings up to top-box. In many cases such a low-effort action is a much more feasible approach to improving scores than assuring that serious problems that result in 6s and below will never occur.

TARP Worldwide has found that a range of "cheap delighters" can both enhance ratings and foster positive word of mouth rather than ambivalent or negative word of mouth.[6] These delighters can range from transactional convenience and financial discounts to proactive communication and emotional connection.[7]

The following examples will illustrate some ways to move passives to raving fans.

Example 1: At a major catalog company, when the phone queue is not excessive, customer service reps are instructed to pick a few customers they feel comfortable talking to and talk to them about something other than the transaction. This building of rapport and emotional connection can lead to a 20-25 percent increase in top-box ratings, all for a 90-second investment of talk time.

Example 2: Recently, at the O'Hare Airport Starbucks, one of the authors asked for a cup of regular coffee and the counter person said with a smile, "I'm just making a new pot so there will be a three-minute wait. But of course it will then be free. Do you mind waiting?" The cost of a cup of regular coffee was minor compared to the increase in this customer's satisfaction. Both of these transactions moved the rating to top-box via frontline flexibility and exemplary interaction skills.

Example 3: A leading quick-service restaurant chain has taken to hiring grandmotherly types to cruise the dining room topping off sweet

teas and interacting with customers. It has found that these ladies can create "micro-bursts of emotional connection" that convert unremarkable transactions into top-box experiences.

Example 4: If you can anticipate the customer's next question or need and proactively deliver it, you move the transaction from uneventful and adequate to dazzling, meriting positive word of mouth. This anticipation and delivery is what we call "psychic pizza" - that is, ringing your doorbell and saying, "Here is the pizza you were about to order." The Auto Club of Southern California has achieved significant increases in service ratings by moving 4s to 5s in its road service offering. It has partially achieved this by assuring that the tow truck operator, upon arrival at the broken-down car, always offers a cold bottle of water and apologizes for the wait, even when they are early. Again, the cost is minimal and the impact is huge.

Recommend four actions

We recommend four actions to address the pitfall and opportunity of passives identified above.

First, **change the organization's attitude** toward the passives - they are not benign and should not be ignored. Stress that they are the biggest single opportunity, usually one-third of your total market.

Second, **create the economic imperative for action** by quantifying the size of the opportunity; the monthly incremental revenue value if passives were moved up to top-box, the word-of-mouth magnitude and direction and the customers' current sensitivity to price and value for price paid all contribute to this economic imperative.

Third, **enhance the interaction skills and flexibility of your front-line staff** to deal with the top five minor challenges they encounter so that they can be uniformly successful in handling them and creating "micro-bursts of emotional connection."

Finally, **experiment with "cheap delighters" and "psychic pizza" actions** that convert the colorless transaction into a remarkable event. These can be simple emotional connections or minor value-adds as described above. | Q

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[3] Goodman, J.A., Broetzmann, S.M. "Ineffective – that's the problem with customer satisfaction surveys." *Quality Progress*. May 1992, pp. 35-38.

[4] TARP is aware that there is a significant debate on the validity of direct translation of 7s and 8s on a 10-point scale to 4s on a five-point scale. Space does not allow addressing that issue in this article.

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[6] Goodman, John. "Treat your customers as prime media reps." *Brandweek*, September 12, 2005: 16.

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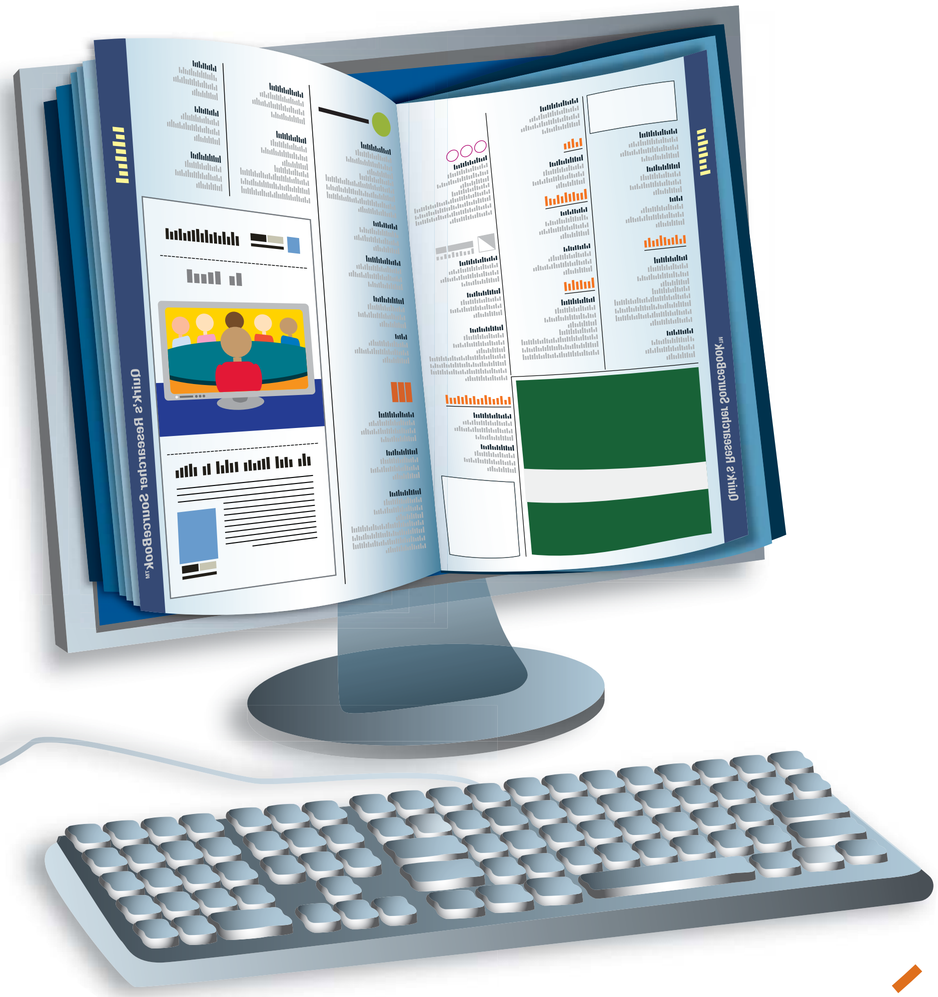

Survey Monitor
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information visit www.nielsen.com.

We're willing to shell out for outstanding service

Everyone knows that customer service matters. The question is, how much? Is going the extra mile to make the customer smile worth it? Research from Polaris Marketing Research Inc., Atlanta, says yes. Over one-third of Americans would be willing or extremely willing to pay 10 percent more for a product or service if they knew that they would get excellent customer service. Thirty percent of Americans are not willing to pay extra to ensure excellent customer service and 36 percent of Americans are not sure whether they would pay extra.

The findings were very consistent over demographic population subgroups. Only males, consumers ages 50+ and lower-income consumers were more likely not to be willing to pay more for excellent customer service.

Additionally, 72 percent agree that "If a company treats me right, I tend to be loyal to them." However, 26 percent say they are less loyal to companies than they were four years ago.

The findings were remarkably stable over demographic subgroups of the population but younger consumers (under 50 years of age) are much more likely to be loyal to companies than older consumers, with older consumers more likely to be looking for the best deal rather than being loyal. For more information visit www.polarismr.com.

Hard-to-reach affluents receptive to digital media and ads

The wealthiest American consumers – those with at least $100,000 annual incomes – have long been difficult for marketers to reach through traditional media like TV and radio. They may want to try digital media, as a new study from the Interactive Advertising Bureau shows that higher-income Americans embrace digital media and its ads.

Conducted by Ipsos Mendelsohn, a New York research company, the Affluent Consumers in a Digital World study found that ninety-eight percent of affluent consumers use the Internet, compared with 79 percent of the general population. They spend 26.2 hours online weekly; 17.6 hours watching TV; and 7.5 hours listening to the radio. The general population, on the other hand, spends about twice as much time weekly with TV and radio – 34 hours and 16 hours, respectively – and just 21.7 hours on the Internet.

Affluents overall comprise 21 percent of U.S. households; have 70 percent of all consumer wealth; and spend 3.2 times more than other Americans on purchases. This sought-after segment, using the Internet to a greater extent than other Americans, tends to recall more ads and to be more aware of advertised brands, products and services. Eighty-eight percent of affluent consumers recalled being exposed to one or more digital ads during the previous week, compared with 84 percent of non-affluent Internet users. Within these groups, affluents recalled 21.1 ads on average versus 20.2 for non-affluents.

Compared with non-affluent consumers, affluent consumers are also somewhat more likely to be aware of new products (55 percent vs. 49 percent), new companies (51 percent vs. 49 percent) and new Web sites (46 percent vs. 44 percent) after viewing digital ads.

In addition, 59 percent of affluent consumers reported taking action based on a digital ad during the preceding six months. The receptivity of affluent Americans to digital advertising is underscored by their greater understanding of the ad-supported Web model and the benefits of ad targeting, as compared with non-affluent consumers. Nearly a one-third of affluents (vs. 23 percent of non-affluents) said they'd be willing to share information about themselves in order to get a more customized online experience. Seventy-two percent (vs. 61 percent) agreed with the statement, "Most Web sites are free because they are supported by advertising." Fifty-seven percent (vs. 51 percent) said they would prefer to see ad-supported online content that is free, rather than paying for content that is ad-free. For more information visit www.iab.net/affluentconsumers.

Store brands regaining ground post-recession

While the majority of global consumers still perceive store brands to be the same as or better than national brands, their positive perceptions toward store brands may be starting to decline, according to a one-year trend analysis from New York research company Ipsos Marketing.

Consumers from around the world were asked to compare store brands to national brands on several attributes. Over 80 percent of global consumers indicated that store brands are the same as or better than national brands on dimensions such as providing good value for the money, meeting their needs, offering convenience, being good for their families and offering products their family requests. However, compared to the same study conducted a year prior, store brand ratings declined somewhat, most notably in the areas of being environmentally-friendly, high-quality, trustworthy, unique and innovative. Taste, efficacy of household products and packaging appeal slipped as well. For more information visit www.ipsos.com.

Automakers offer most appealing lineup of new vehicles

As the auto industry battles through another difficult year, vehicle manufacturers are fighting to win customers by offering the most appealing vehicles in history. According to the 2011 U.S. Automotive Performance, Execution and Layout (APEAL) study from Westlake Village, Calif., research company J.D. Power and Associates, overall vehicle appeal has reached an all-time high since the study's inception in 1996, with the industry average increasing to 781 on a 1,000-point scale (up from 778 in 2010).

Furthermore, recently-launched, all-new and redesigned models are substantially more appealing than their carryover counterparts, widening the gap in score for a second consecutive year. In 2011, the gap was 29 points, compared with 18 points in 2010 and 10 points in 2009. This improvement is partially driven by higher ratings for vehicle styling and fuel economy provided by owners of recently-launched vehicles.

While all-new and redesigned models have more problems, on average, than do carryover models, these same models are more likely to offer the styling, performance and features that customers are looking for.

BMW and Dodge each captured three segment-level awards. BMW models that received awards were the X3, Z4 Roadster and 5 Series, while Dodge received awards for the Challenger, Charger and Durango. The Charger, Durango, X3 and 5 Series were all redesigned for the 2011 model year. Ford and Honda captured two model-level awards each, with Ford receiving awards for the all-new Fiesta and F-150 LD and Honda for the Ridgeline and redesigned Odyssey.

The Chevrolet Volt, Hyundai Equus, Land Rover Range Rover, Lexus IS, MINI Countryman, Nissan Armada, Porsche Cayenne, Scion xB, Suzuki Kizashi and Volkswagen GTI also received awards. Of these, the Countryman, Equus and Volt are all-new models, while the Cayenne was redesigned. The Equus achieved the highest APEAL score of any model in the industry in 2011. This is the first year that a model other than the BMW 7 Series, Lexus LS or Mercedes-Benz S-Class has led the overall model ranking.

Three models ranked highest in their respective segments in both the 2011 APEAL Study and the 2011 IQS: the Dodge Challenger, Ford F-150 LD and Honda Ridgeline.

Porsche was the highest-ranking nameplate in the 2011 APEAL Study for a seventh consecutive year. Hyundai improved from 2010 more than any other nameplate this year, while Jeep and Chrysler also improved considerably. For more information visit www.jdpower.com.

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sample. For more information visit www.ipsos.com/mediact.

Four updates from comScore

Reston, Va., research company comScore Inc. has launched Social Essentials, a social media measurement platform designed to quantify social media brand impressions and incorporate them into a measurement of the marketing mix. The first installment of this service provides global reporting and analysis of audiences exposed to brand messages over Facebook, while subsequent releases will incorporate findings for additional social media channels, including Twitter. Social Essentials is optimally designed for brands with at least 500,000 Facebook fans.

Social Essentials includes the following insights and capabilities: the number of fans and friends of fans reached with paid, earned and owned social media brand impressions along with the total number of brand exposures; the ability to compute traditional media planning metrics such as reach, frequency and GRPs for social media brand impressions; the demographic composition of fans and friends exposed to social media brand impressions; the online behavior and brand engagement of these fan and friend segments; competitive intelligence on other brands' social media audiences, including demographic and behavioral comparisons and audience overlap; and the behavioral impact of exposure to social media messages, marketing and advertising campaigns.

In conjunction with this announcement, comScore and Facebook have also released a complimentary white paper demonstrating the various applications of the Social Essentials tool using Facebook Fan audience data for Starbucks, Southwest Airlines and Microsoft Bing. To download a copy of the white paper visit www.comscore.com/like.

Separately, comScore has introduced the comScore Smart Lift Attribution Model, a methodology that aims to bring the science of attribution to brand measurement. The model is based on marketing-mix modeling techniques to accurately allocate display ad campaign performance by publisher or publisher type, demographic groups, interest segments, audience segments from third-party data providers, advertising creative, creative placements and client-defined segments. The model is currently being applied to comScore AdEffx Brand Survey Lift studies in the U.S.

Additionally, comScore has released its AdEffx Campaign Essentials campaign audience validation tool in Canada.

Finally, comScore has introduced comScore Digital Analytix in Latin America. Digital Analytix is a Web analytics solution designed to allow digital marketers and analytics professionals to conduct in-depth forensic research on site-level activity. For more information visit www.comscore.com.

EasyInsites enhances EasyPanel product

Surrey, U.K., research company EasyInsites has added several features to enhance its EasyPanel offering. New functionalities include the EasyIdeas product, which is designed to allow participants to generate new ideas around a particular topic they are provided and vote on their favorites; the ability to initiate and participate in unstructured and uninterrupted discussions among panelists on topics of their choice; and more flexible content features to enable results and other engaging information to be confidentially shared within the site to panel members only. For more information visit www.easyinsites.com.

Forrester debuts MROC; branches into Russia

Forrester Research, Cambridge, Mass., has released a series of new consumer data products, including a market research online community (MROC) called Community Speaks and the expansion into Russia of Forrester's industry-leading Consumer Technographics.

Community Speaks is based upon an MROC of 2,000+ participants. CommunitySpeaks provides qualitative consumer insights built from foundational Technographics data on topics such as customer experience and loyalty; consumer technology adoption; and media and Internet behaviors and attitudes.

With expansion into Russia, Forrester's Consumer Technographics will survey 330,000 consumers in 18 countries this year, providing insights into how technology affects global consumers' attitudes, behaviors and motivations. Forrester will survey 5,000 Russian consumers. For more information visit www.forrester.com.

Research Now brings mobile panel app to Australia

Research Now, Plano, Texas, has launched its mobile app, Valued OpinionsMobile, in Australia. The app is available for Android and iPhone operating systems and is the first smartphone app with full survey functionality. The app is designed so that Valued Opinions' panel members can take paid surveys in Australia without an Internet connection (other than for receiving the survey and sending the responses back at the end of the survey). Valued Opinions Mobile is free to download via iTunes for the iPhone version and the Marketplace for the Android app. For more information visit www.researchnow.com.

Nielsen online rating system launches with Facebook as partner

New York researcher The Nielsen Company has released online campaign ratings - a gross ratings point (GRP)-equivalent system for Web advertising - with Facebook as one of its data partners. The system is designed to work using pixel-tracking so that when a particular display or video advertisement is shown in a browser this is reported to Nielsen and to other approved data contributors, including large Web publishers and Facebook. Data partners then report back to Nielsen on the demographic profiles of those who have seen the ads in the form of aggregate-level reports containing reach and frequency information in anonymous age and gender buckets. For more information visit www.nielsen.com.

Briefly

Michael Lowenstein, executive vice president of Market Probe, a Milwaukee, Wis., research company, has written a book, titled *The Customer Advocate and The Customer Saboteur*, that addresses how to minimize or eliminate customer indifference, alienation and sabotage. The book is available through ASQ Quality Press at http://bit.ly/advorsab.

Miami research company has introduced the Savvy University Faculty of Expert Advisors, a team of researchers dedicated to providing training via Web-based seminars and online classes for executives who need to address the changing demographics of their markets. The advisors are also available for consultation via Geoscape's Savvy University, a program designed to offer free access to the resources needed to stay updated with the Geoscape Intelligence System. The faculty includes Tony Suarez, Isabel Valdés, Felipe Korzenny, Terry Soto and Greg Gálvez. For more information visit www.geoscape.com/faculty.asp.

Stockholm, Sweden, eye tracking company Tobii Technology, has launched Tobii Insight, a service designed to provide comprehensive and cost-effective eye-tracking research solutions by lowering the entry cost. It also aims to give market research firms a way to offer eye tracking to customers without purchasing eye-tracking equipment or hiring full-time eye-tracking analytics experts. For more information visit www.tobii.com.

New York research company WorldOne has developed Emunity, a system of checks and balances intended to ensure that panelists have been verified through several methods, including proven employment from their place of business; digital fingerprinting through RelevantID; validation via opt-in processes; and detection for fraudulent activity. For more information visit www.worldone.com.

Columbus, Ohio, research company iPinion LLC has released iPinion 2.0 survey application for iPhone and Android devices. For more information visit www.ipinionsurveys.com.

Roy Morgan Research, Melbourne, Australia, has introduced a single-source survey in India, designed to capture the decision-making process in a detailed manner and across a long time period with multiple face-to-face visits. The quarterly study will tabulate information on demographics, purchase behavior, attitudes and lifestyle, retail activity, products, brands and other variables. The sample size will be at least 265,000 people. For more information visit www.roymorgan.com.

Research companies Synovate, Chicago, and VideoMining, State College, Pa., have partnered to combine in-store analytics with attitudinal research for the landmark supermarket industry study, the Center Store MegaStudy. The Center Store MegaStudy will use VideoMining's in-store measurement and analytics technology in stores in 15 U.S. markets to analyze over 10 million grocery trips over a period of a few months. For more information visit www.synovate.com.

Dallas research company Toluna has released its QuickSurveys DIY survey tool in 15 new markets, bringing its total reach to 21 countries. Toluna has also launched an improved Ask the Nation census rep algorithm, intended to balance results to census data in many new markets. For more information visit www.tolunaquick.com.

Convio Inc., an Austin, Texas, customer engagement firm, has released its Integrated Multi-channel Marketing study. Conducted by Edge Research, Arlington, Va., the study aims to explore the success factors for organizations already on their integrated multichannel journey; peer comparisons; and where to focus to improve success. The study focused on five core areas: integrated marketing metrics; integrated marketing best practices; activity levels in new media; organizational strategy; and integrated marketing priorities. For more information visit www.convio.com.

New York research company OnePoint Surveys has rebranded as OnePoint Global. The firm is online at www.onepointglobal.com.

The Research and Engagement Division of Chime Communications PLC, London, has rebranded as CIE - Chime's Insight and Engagement Division. The division is online at www.cie.uk.com.

Vancouver, B.C., research company Vision Critical has updated its Web site (www.visioncritical.com), including a new corporate video and logo.

The Advertising Research Foundation (ARF), New York, has completed a Web site usability study via GfK SirValUse and GfK's nurago technology from GfK Custom Research North America, New York, to improve the user experience for ARF Web site visitors. For more information visit www.thearf.org.

20|20 Technology, a division of 20|20 Research Inc., Nashville, Tenn., has released its second e-book, *The Essential Guide to Mobile Qualitative Research*. The book is available as a free download from www.2020research.com.

Adapt Inc., a Minnetonka, Minn., research processing company, has begun offering print, mail and return mail processing in Canada. For more information visit www.adaptdata.com.

New York research company Ipsos Observer has launched Social Observer, a customizable research solution that can be used independently or integrated with traditional market research. As a research tool, Social Observer allows users to conduct a variety of research functions including pre-survey investigation and questionnaire development; concept development, discovery and ideation; supplement research; tracking data to measure consumer trends, topics as well as sentiment; ad planning; and post-survey analysis. For more information visit www.ipsos-na.com/research/observer.

Research Panel Asia Inc. (RPA),

Tokyo, has launched a smartphone application in China for both Android and iOS. The app is designed to enable RPA's panelists to access new survey information; participate in quick polls; receive the latest news; and check the balance of rewards via smartphone. For more information visit www.researchpanelasia.com.

Lightspeed Research, Warren, N.J., has launched online panels in Poland and Greece. For more information visit www.lightspeedresearch.com.

Polaris Marketing Research Inc., Atlanta, has released SurveyTrac for Associations, a tool designed to provide associations affordable marketing research with their members. Additionally, Polaris has re-launched its blog, The Marketing Dialog (www.polarismr.com/tmd). For more information visit www.polarismr.com.

ORC International, a Princeton, N.J., research company, has launched engage for joiners, a survey product intended to allow organizations to evaluate the engagement, productivity and costs of new joiners. Using the joiners module, organizations can identify opportunities and potential challenges facing new joiners and weaknesses that may lead to employees leaving their position prematurely. For more information visit www.orcengage.com.

Research Rockstar, Westborough, Mass., has released SurveyGrader, a free online survey grading tool created to help novice designers. SurveyGrader is designed to offer free, instant feedback on survey design through a series of 11 questions. For more information visit www.researchrockstar.com.

The Interactive Advertising Bureau (IAB), New York, has opened the IAB Ad Lab, where advertisers can address the industry's needs and opportunities. The IAB Ad Lab features a modular space that can accommodate presentation-style gatherings for as few as five and as many as 74 participants. For more information visit www.iab.net.

Research companies TNS, Horsham, Pa., and Alenty, Paris, have partnered across Europe to offer TNS Digital AdEffect, a solution designed to measure the effectiveness of online display advertising by reporting back on what elements of the ad consumers are exposed to and for how long. The solution is available in France, Germany, Spain and the U.K.

Ethnographer Siamack Salari has released an EthOS (ethnographic observation system) mobile app. The app is available in 15 languages on iPhone, BlackBerry and Android devices. For more information visit www.ethosapp.com.

The NPD Group, a Port Washington, N.Y., research company, has debuted its consumer tracking service for the consumer electronics industry. For more information visit www.npd.com.

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India, research company **Direxions Global Solutions Private Ltd.** While financial terms of the agreement were not disclosed, LoyaltyOne secured its equity stake for an investment of less than $5 million, with an option to increase its ownership stake and financial investment gradually.

JWT North America, a New York research company, has acquired **Lunchbox LP**, a Los Angeles research company. Lunchbox will retain its name, operations and staff.

Omaha, Neb., research company **Infogroup** has sold Princeton, N.J., research firm, **ORC International** to **Lake Capital Management,** a Chicago private equity firm. Terms of the transaction were not disclosed.

London research company **Populus Data Solutions** has acquired an 85-seat call center from **SPA Future Thinking**, a U.K. research company, and signed an agreement with the firm naming it preferred supplier of telephone research services. The call center is based in Newcastle.

New York researcher **The Nielsen Company** has acquired 100 percent of Berkeley, Calif., research company **NeuroFocus**. NeuroFocus will continue to be led by founder and CEO A.K. Pradeep.

Additionally, Nielsen and **GfK MRI**, a New York research company, have each acquired 25 percent of **Media Behavior Institute**, a New York research company, to support the launch of USA TouchPoints, a cross-media research service.

Finally, Nielsen has acquired **Marketing Analytics**, an Evanston, Ill., research company. Marketing Analytics' 52 employees will join the Nielsen team and Nielsen will acquire all other assets including software and ongoing client projects. Marketing Analytics will be rebranded as Nielsen Marketing Analytics. Terms of the transaction were not disclosed.

New York research company **StrategyOne** has acquired Rochester, N.Y., research company **PluggedIN**. The firm will operate as StrategyOne, including a PluggedIN Communities team.

Nuremberg, Germany, research company **The GfK Group** has acquired Bangkok, Thailand, research company **MarketWise**. GfK has also increased its stake in Long Beach, Calif., data company **Etilize** to 75 percent. **GfK Retail and Technology** has completed a 100 percent acquisition of market research company **GfK-MEMRB Marketing Services** in Cyprus. In addition, **GfK Retail and Technology Baltic** has established a retail panel in Belarus.

Menlo Park, Calif., research company **Knowledge Networks** (KN) has acquired **Garcia Research Associates** (GRA), Burbank, Calif. GRA will maintain its home office in Burbank and allow KN access to its operations center in Tijuana, Mexico.

Alliances/strategic partnerships

Exmovere Holdings Inc., a McLean, Va., biomedical engineering company, has partnered with **Luth Research**, San Diego. The agreement provides ways to develop and implement physiology-based questions and analysis using Exmovere's algorithms and methods of emotion detection.

Chicago research company **Synovate** has integrated its global analytic and strategic business units Marketing Management Analytics and Synovate Management Analytics. The single unit will be branded as **MMA**.

Atlanta research company **AboutFace Consulting Corporation** has joined the **Customer Experience Professionals Association**, a Wakefield, Mass., trade group.

India outsourcing company **WNS** has renewed its contract with London research company **Kantar**.

Sands Research Inc., El Paso, Texas, and **Brain Intelligence Neuro-Consultancy Ltd.**, Beijing, have partnered to establish a neuromarketing alliance in China and globally.

Research companies **Survey Sampling International**, Shelton, Conn., and **Opinionology**, Orem, Utah, have received regulatory approval to unite under the SSI brand.

Research companies **nViso**, Lausanne, Switzerland, and **Gordon & McCallum**, Sydney, Australia, have partnered to implement nViso's emotional response technology in the market research sector.

Association/organization news

The Council of American Survey Research Organizations (CASRO), Port Jefferson, N.Y., and **ESOMAR**, Amsterdam, the Netherlands, have partnered to develop an online sample quality standard.

Additionally, CASRO has drafted its Social Media Research Guidelines to provide an ethical framework for research work performed within the formats, behavior systems, terminologies and varied privacy expectations of the social media space.

The Market Research Association, Washington, D.C., has welcomed amendments made to the Safe Data Act, a data security bill that threatened to give the **Federal Trade Commission** (FTC), Washington, D.C., wide-ranging powers over the definition of personal information. The revision prevents FTC rulemaking authority on data minimization provisions.

Awards/rankings

Harris Kaplan, CEO of Healogix, a Horsham, Pa., research consultancy, has been honored as one of the PharmaVOICE 100, an annual list from *PharmaVOICE* magazine of the most inspiring people in the life science industry.

Encino, Calif., research company

uSamp has been named one of the best places to work in Los Angeles, according to the *Los Angeles Business Journal*. USamp was ranked fifth of 75 finalists in the medium-size companies category, which includes businesses with 25-to-249 employees. Companies were evaluated based on workplace policies, practices, philosophy, systems and demographics and according to a survey that measured the employee experience.

Steven H. Cohen, co-founder and partner of Needham, Mass., research company In4mation Insights, has been named the recipient of the 2011 Charles Coolidge Parlin Marketing Research Award from the **American Marketing Association**, New York. The award recognizes Cohen's contributions and dedication to the ongoing advancement of marketing research practice.

Research companies **The Pert Group**, Farmington, Conn., and **Vision Critical**, Vancouver, B.C., made their inaugural appearance in the 2011 Honomichl Top 50 Report of the top 50 revenue-generating marketing research firms operating in the U.S.

Digital Research Inc., Kennebunk, Maine, has won the Gazelle Company of the Year Award from **TechMaine: The Technology Association of Maine**. The award honors the company's contributions to the state's technology sectors.

New accounts/projects

Frankfurt, Germany, online retailer **OTTO** and **The BBC**, London, have adopted Reston, Va., research company **comScore Inc.**'s Digital Analytix platform.

Chicago research company **SymphonyIRI Group** has been selected by **Walmart**, Bentonville, Ark., to introduce Customer Advantage, a next-generation, Web-based shopper insights and collaborative planning platform. The platform will be powered by SymphonyIRI's Liquid Data technology and analytics.

London research company **TNS** has been awarded the Flash Eurobarometer contract by the **European Commission and European Parliament**. This is a four-year contract with a potential budget of 60 million euros.

Cambridge, Mass., research company **Crimson Hexagon** has selected the **United Talent Agency** (UTA), Beverly Hills, Calif., for representation and has added the agency to its client roster. UTA will advise the firm on business development in the entertainment and media sector as part of Crimson Hexagon's expansion strategy.

Maritz Research, St. Louis, has adopted Westport, Conn., research company **Imperium**'s RelevantID digital fingerprinting technology for fraud prevention.

Stockholm, Sweden, research company **Cint** has added the **National Union of Students** and **Student Beans** in the U.K. and the **W5 Student Panel** in Ireland to its student panel base.

Additionally, U.K. research company **Snap Surveys** as implemented Cint Direct Sample for access to six million panelists worldwide.

London research company **Kantar** has adopted San Francisco research company **MarketTools Inc.**'s TrueSample platform as its validation solution for all U.S. online consumer survey-based research.

Walmart, Bentonville, Ark., has selected New York researcher **The Nielsen Company** to receive and analyze sales information from Walmart's U.S. stores. The agreement marks Walmart's return to the consumer packaged goods industry's information-sharing model.

CNN, New York, has renewed its five-year partnership with **ORC International**, a Princeton, N.J., research company, on the CNN|ORC International poll.

Harmon Research Group, Ananheim, Calif., has selected **Kinesis Survey Technologies LLC**, an Austin, Texas, research company, as its survey software platform.

Scarborough Research, New York, has extended its relationship with **Starcom MediaVest Group Inc.** (SMV), Chicago, and **ZenithOptimedia** (ZO), London, to help guide local media planning, buying activities and communications planning projects for SMV and ZO.

Additionally, SMV and ZO have renewed their multi-year ratings and software contract with Columbia, Md., research company Arbitron Inc. The contract provides access to the monthly reports in all Portable People Meter markets, data reports for all diary markets, as well as RADAR, Nationwide and TAPSCAN Web services.

New companies/new divisions/relocations/expansions

Oslo, Norway, research software company **Confirmit** has opened a subsidiary in Cologne, Germany. The division is online at www.confirmit.com/de.

Framingham, Mass., research company **Kadence International** has opened 55 more offices across India.

Leger Marketing, a Montreal, Quebec, research company, has launched **Leger Analytics**, a division dedicated to statistical and modeling consulting. Chuck Chakrapani, president of Leger Marketing's Toronto office, will lead the division.

Lightspeed Research, Warren, N.J., has expanded its presence in Hong Kong and moved into new office space in the city's Quarry Bay section.

Boston research company **Compete** expanded its research into Europe, beginning with the U.K. and France.

Farmington Hills, Mich., research company **Morpace Inc.** has opened an office in Shanghai, China, naming Tong Zhou as research director.

Ipsos ASI, New York, has launched Ipsos ASI Digital to address brand and advertising development.

The Pert Group, a Farmington, Conn., research company, has established a London office at One Fetter Lane, Suite 5.14.

Encino, Calif., research company **uSamp** has opened a London office as part of its expansion into Europe.

Research company earnings/ financial news

Nunwood, Leeds, U.K., recorded a 13.4 percent rise in sales for the first half of 2011, compared to the same period last year, and global revenues of over $9.5 million.

Affinova, Waltham, Mass., announced record sales for fiscal year 2011. Overall sales grew at a rate of 44 percent.

The GfK Group, Nuremberg, Germany, increased sales by 8.3 percent to 660.1 million euros in the first six months of 2011. There was a significant increase in adjusted operating income of 16.8 percent to 83.9 million euros, compared with the first six months of the previous year.

The Nielsen Company, New York, reported second-quarter revenue of $1,396 million. Revenues for the first half of 2011 increased 9 percent to $2,698 million.

Ipsos, Paris, achieved organic growth of 6.3 percent in the first half of 2011.

BrainJuicer Group PLC, London, achieved first-half 2011 revenue approximately 25 percent ahead of the prior-year period.

Arbitron Inc., Columbia, Md., reported second-quarter earnings that doubled from a year earlier. Net income was $7.6 million on $95.7 million in revenue for the three months ended June 30, compared to net income of $3.8 million on $88.3 million in revenue for the same period in 2010.

Rentrak Corporation, Portland, Ore., announced financial results for the full year ended March 31 and first-quarter ended June 30. Consolidated revenues for fiscal 2011 rose to $97.1 million from $91.1 million for fiscal 2010. Operating loss for fiscal 2011 was $2.6 million, compared with $0.9 million for fiscal 2010. For first-quarter 2012, consolidated revenues were $22.4 million, compared with $24.6 million for first-quarter 2010. Operating income was $246,000. Net income was $399,000, compared with $87,000 for the prior-year period.

Kantar, London, has made a strategic investment of $3 million for a minority stake in Affectiva Inc., a Waltham, Mass., provider of tools and technology that measure emotional responses of consumers.

ComScore Inc., Reston, Va., has signed a $50 million revolving credit agreement with Bank of America N.A., Charlotte, N.C. The two-year deal also includes a $10 million sublimit to support standby letters of credit.

Names of Note
continued from p. 10

Terry Sweeney has been hired as vice president, operations and client services, of *Cross-Tab*, a Bangalore, India, research company. Sweeney will be based in San Jose, Calif.

Gongos Research, Auburn Hills, Mich., has named **Michael Francesco Alioto** vice president, global method-

Alioto **Siluk**

ologies; and promoted **Lynn Siluk** to vice president, marketing sciences.

Mitch Danklef has been named senior vice president, client development, at Fresno, Calif., research company *Decipher Inc.* **Bonnie Sherman** has been promoted to senior vice president, custom panel development.

Farmington, Conn., research company *The Pert Group* has hired **Mike Bellhouse** as group director, HBA; **Jim Nikolis** as senior account director, finance/industry; and **Kim Royster** as director, client strategy.

Atlanta research company *CMI* has hired **Janice Harllee** as controller; **Pamela Vaughn** as field manager; and **Sarah Bromley** as associate project manager.

David Nelems has returned to Norcross, Va., research technology company *ActiveGroup Ventures* as CEO.

W5 Inc., a Durham N.C., research company, has appointed **Amy Mock**

Mock **Shook**

as practice consultant and promoted **Tristan Shook** to senior consultant.

Julie Altman and **Wayne Goodreau** have joined the research team at *Invoke Solutions*, a Waltham, Mass., research company.

The GfK Group, a Nuremberg, Germany, research company, has appointed **Matthias Hartmann** as CEO of GfK SE.

Vancouver, B.C., research company *Vision Critical* has named **Ray Poynter** executive vice president and managing director for the company's London office. Additionally, Vision Critical has hired **Tyler Douglas** as vice president, business development, software.

Paris research company *Ipsos* has made two appointments to its Asia-Pacific division. **Grant Bertoli** has been named regional director, Southeast

Bertoli **Ng**

Asia (SEA), and managing director, Singapore; and **Melanie Ng** has joined Ipsos Singapore as SEA regional director, technology.

Columbia, Md., research company *Arbitron Inc.* has promoted **Sean Creamer** to executive vice president and COO. Additionally, Arbitron has added **Ronald G. Garriques** to its board of directors.

Weekends Only Furniture Outlet, St. Louis, has promoted **Kristin Elsner** to marketing supervisor. Research will be among her responsibilities.

Cincinnati research company *Ipsos Understanding UnLtd.* has named **Marilyn O'Brien** chairwoman and CEO. **Peter Weylie** and **Ali Perry** have been promoted to co-president.

Cogent Research, Cambridge, Mass., has appointed **Marie Rice** to manage the customer marketing research team.

Martin Lambie-Nairn has been appointed creative director of

London research company *TNS*.

Merlin Chiang has joined *Polaris Marketing Research Inc.*, Atlanta, as data analyst.

Phoenix Marketing International, a Rhinebeck, N.Y., research company, has appointed **Delphine Duchateau** as group director. She will be based in Surrey, U.K.

Los Angeles research company *MarketShare* has hired **Dirk Beyer** as senior vice president, analytics and modeling.

New York research company *Millward Brown* has hired **Susan Steele** as global chief human resources officer.

Jag Duggal has been appointed vice president, product management, of San Francisco research company *Quantcast*.

Ipsos in South Africa, Randburg, South Africa, has appointed **Elmari Campher** as head of innovation and brand research.

Craig Foster has joined *ABI Research*, Oyster Bay, N.Y., as senior analyst, home automation systems.

Adam Salter has joined the innovation practice at Chapel Hill, N.C., research company *The Futures Company*.

San Francisco research company *Added Value* has hired **Kate Jones** as brand director to its U.K. division in London.

Omaha, Neb., research company *Infogroup* has hired **Christian Ward** as senior vice president, data strategy, analytics and capabilities; and **Dana Hayman** as vice president, marketing strategy and insights.

Synovate India, New Delhi, has hired **Ruma Sengupta** as director, insights; and **Sachin Chaudhari** as research director. Additionally, **Avijit Ghosh** has joined Synovate's *Motoresearch* division in Mumbai as associate director.

Redwood City, Calif., data management company *Ingres Corporation* has named **Steve Shine** president and CEO.

David Algranati has been appointed senior vice president, product innovation and analytical solutions, of Portland, Ore., research company *Rentrak Corporation*. Separately, Rentrak has named **Brent Rosenthal** non-executive chairman of its board of directors.

Scott E. Howe has been named president and CEO of Little Rock, Ark., marketing services company *Acxiom*.

Ashok Das has been elected president of the *Market Research Society of India*, Mumbai.

Boston research company *Compete* has hired **Scott Centurino** as COO.

Bill Guerin has joined Dallas research company *Toluna* as head of sales, North America.

Kantar Video, a New York division of Fairfield, Conn., research company Kantar Group, has appointed **Arthur McKinley** as vice president, business development.

Oslo, Norway, research software company *Confirmit* has hired **Claire Sporton** as director, customer experience management.

Cincinnati research company *dunnhumbyUSA* has made the following promotions: **Meredith Edwards** to associate director, client leadership; **Mindy Hazelwood** to director, insights; **Patty Taylor** to director, client leadership; **Stephanie Weingartner** to associate director, communications and media; **Natesh Shetty** to associate director, U.S. products; and **Jessica Tepas** to senior associate, client leadership.

calendar of events

Featured Event

SERVICE MANAGEMENT GROUP

Service Management Group will hold a Webinar, themed "Beyond the Survey – Engaging Respondents and Connecting with Customers," on **October 19** at 12 p.m. CDT. Joe Cardador, chief research officer at Service Management Group, will present. For more information visit https://quirks.webex.com.

The Qualitative Research Consultants Association will hold its annual conference on **October 12-14** at The Venetian in Las Vegas. For more information visit www.qrca.org.

The Asia Pacific Research Committee will hold its annual conference on **October 15** in Xi'an, China. For more information visit http://www.jmra-net.or.jp.

The Pharmaceutical Marketing Research Group will hold its annual meeting of The PMRG Institute on **October 16-18** at the Hyatt Regency Jersey City in Jersey City, N.J. For more information visit www.pmrg.org.

The Council of American Survey Research Organizations will hold its annual conference on **October 19-21** at The Breakers in Palm Beach, Fla. For more information visit www.casro.org.

The Life Insurance and Market Research Association will hold its annual conference on **October 23-25** at the Hilton New York. For more information visit www.limra.com.

ESOMAR will hold its 3D digital dimensions conference, themed "(Online + Social Media + Mobile) Research," on **October 26-28** at the Sunny Isles – Trump International Beach Resort in Miami. For more information visit www.esomar.org.

Geoscape will hold a conference, themed "New American Mainstream Business Summit," on **October 26-28** at the Epic Hotel in Miami. For more information visit www.geoscape.com/summit.asp.

Research & Results will hold its annual market research show on **October 26-27** at the M.O.C. Convention Center in Munich, Germany. For more information visit www.research-results.com.

The International Quality and Productivity Center will hold its Marketing 360 Exchange conference on **November 6-8** at the Sawgrass Marriott in Ponte Vedra Beach, Fla. For more information visit www.marketing360exchange.com.

IIR will hold its annual conference, "The Market Research Event 2011," on **November 7-9** at The Peabody Orlando in Orlando, Fla. Register with the code QUIRKSNEWS to save 20 percent. For more information visit http://www.iirusa.com/research/event-home.xml?registration=QUIRKS11AD.

ESOMAR will hold its qualitative research conference, themed "Embrace, Inspire and Celebrate," on **November 13-15** at the Radisson Blu Palais Hotel in Vienna, Austria. For more information visit www.esomar.org.

The University of Texas at Arlington (UTA) will holds its annual conference for alumni of its Master of Science in Marketing Research program, themed "Innovation in Marketing Research," on **March 9** at UTA.

SymphonyIRI will hold its annual summit on **March 19-21** at the ARIA Resort and Casino City Center in Las Vegas. For more information visit www.sigsummit.com.

The Advertising Research Foundation will hold its annual RE:THINK! convention and expo on **March 26-28** at the New York Marriott Marquis in Times Square. For more information visit www.thearf.org.

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

index of advertisers

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trade talk

By Joseph Rydholm
Quirk's editor

23 years and counting

When I started at *Quirk's Marketing Research Review* in 1988 as managing editor, I had no idea I'd still be here 23 years later. Heck, back then, taking my first full-time job as a newly-minted University of Minnesota journalism school graduate, I had no idea where I'd be 23 months later. I was just glad to have an editorial gig, and one at a magazine to boot, since magazine editing was my area of specialization during j-school. That it was right in my backyard here in the Twin Cities was icing on the cake.

Marketing research? Didn't know a thing about it. (And, as I always quip, some would say I still don't.) My new boss? Tom Quirk seemed like a decent guy. Very friendly, a sports nut like me, knew my late father (he had died when I was 14) as they had both worked in the local agrimarketing circles in the 1970s. My new workplace? As a freelance arts writer since my high school days, I'd seen my share of funky office setups when meeting with editors at various local publications (there ain't a lot of money in writing about the arts!). Quirk's HQ circa 1988 was no different. We were in a squat brown "office" building, next to a municipal liquor store and across the freeway from the airport. The walls in many of the rooms sported a faux dried-grass wallpaper from some previous tenant that wouldn't have been out of place in a tiki bar. The chairs and desks were from a mish-mash of eras, some of a more recent time, some that looked like they could have been immortalized in an Edward Hopper painting.

I would come to find that the low-cost/no-cost furnishings were a perfect embodiment of Tom's lack of pretense and a clear expression of where his priorities were for the magazine. He cared more about substance than style. He wasn't interested in the trappings of being a publisher, of attempting to impress with some grandiose, ego-driven undertaking. He was an entrepreneur who had an idea for a business-to-business publication, one that focused on helping readers get the most out of their marketing research projects.

He impressed on me at the outset the need to keep the editorial content as substantive and real-world as possible, to give readers useful information they could apply in their day-to-day work. As he discusses elsewhere in this issue, during his years in marketing before starting the magazine, he encountered the situation too many times where people would receive research data from him and his team and say "This is great. What do we do with it?" His goal with each issue of the magazine was to answer that question.

Looking back on my early years with the magazine, I still can't believe that I was able to find enough material to fill issue after issue after issue. Marketing research, after all, is something that most companies don't want to talk about and they forbid their supplier partners from doing the same. What saved me, and what sustains the magazine even today, is the collegial spirit that pervades this business. As I have written about many times here, researchers are keen to share their ideas, their experiences and their hard-won lessons, with the aim - stated or otherwise - of improving the stature and impact of marketing research.

Never use the word fascinating

When I tell people I edit a magazine for the marketing research industry, they don't exactly draw closer with excitement. Most folks aren't even clear what marketing research is, and those who feel like they know what it is would never use the word fascinating to describe it. (I'm always amazed at how they don't seem to hear the research part, focusing instead on the word marketing. "So like, direct mail and that kind of stuff?" No, not exactly.)

But I think marketing research is fascinating - likely another reason why I've stayed here as long as I have. (Had the magazine's focus been on industrial coatings or grommets and fasteners, my tenure might have more brief.) After all, much of marketing research is devoted to figuring out what makes consumers tick or what makes a successful ad or a new product launch. And we human beings aren't easy to understand, so the industry is constantly coming up with new ways to gather information on our consumption habits, which makes my job all the more interesting.

It's also a great fit for me, personality-wise, because I'm a fan of the underdog, of those who toil in obscurity while others claim the spotlight. This industry needs champions and we've been happy to function as one. After all, what part of the marketing machine gets less respect and consideration than research? It's dismissed when its findings conflict with internal beliefs. It's ignored when they confirm them. And it's the first item to be cut when budgets need slashing.

Plus, that whole "no respect" thing also resonates with those of us here in the Midwest (aka flyover country). Like many of my fellow Midwesterners, I've got a bit of chip on my shoulder regarding my home region's place in the grand scheme of things. I long ago grew tired of the coastal chauvinism that holds that nothing of import happens here in the business world, even though we're the birthplace of iconic brands like 3M, Target, Best Buy, Medtronic, General Mills and Pillsbury.

Add it all together and 23 years in the same job doesn't seem so unlikely.

Reshaped all of our lives

Much has changed in the industry since the first issue of *Quirk's* came out in late 1986. Landline phones, once a given in every household, are increasingly the exception rather than the rule. The Web and mobile computing technologies have reshaped all of our lives and research along with them.

We've changed as well, expanding our publishing schedule from the initial eight issues to 12, adding an outstanding Web site, a fortnightly e-newsletter and apps for the iPad, iPhone and Android.

What hasn't changed is our commitment to maintaining Tom's vision. For my part, I'm gratified that he entrusted me with guiding the editorial content of the magazine and I'm proud to have played a role in making his dream an enduring reality.

What initially seemed on that late-summer day in 1988 like a welcome first step on the path to bigger and better things became proof that sometimes you don't have to go very far to find exactly what you're looking for. | Q

classified ads

Coming in the November issue...

MR in China
David Ying Hon Ho looks at considerations for researchers planning to conduct research in China.

Weeding the respondent garden
MarketTools Inc.'s Nallan Suresh outlines how to identify and exclude bad respondents from research studies.

Not the best route?
Lightspeed Research's Efrain Ribeiro explains why there are concerns surrounding survey routers.

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before you go...

online and offline

News about Quirk's and quirks.com

Quirk's founder honored by MRA

Quirk's would like to congratulate its founder and former publisher, Tom Quirk, for receiving the Meritorious Service to Marketing Research Award from the Marketing Research Association at the Corporate Researchers Conference in Chicago on September 21-23. The award honors Tom Quirk's lifelong commitment to and achievement in the research industry.

Magazine makeover revealed next month

Your favorite marketing research magazine is getting a makeover! Our interesting and educational content will remain the same but starting in November it will be delivered with a fresh new look. We hope that the redesign will be easier to navigate and better integrated with our cross-media offerings. Keep an eye out for next month's issue and let us know what you think of our updates!

Get published in Quirk's in 2012!

Quirk's 2012 editorial calendar is set and we are accepting submissions! The 2012 calendar includes new research topics, such as technology-driven qualitative research (May) and customer experience research (October). Visit tinyurl.com/quirksedcal to check it out. To submit an article for consideration, send materials to Quirk's Editor Joseph Rydholm at joe@quirks.com. Additionally, to submit a press release about company goings-on for one of the Quirk's departments (i.e., Names of Note, Product and Service Update, Research Industry News, etc.), send materials to emily@quirks.com. Quirk's reserves the right to edit any materials submitted for publication.

cover-to-cover

Facts, figures and insights from this month's issue

> Never change the smallest thing without telling the survey developer. When a designer sees that you made a change without telling them, they will immediately want to know if you changed anything else and will lose faith in your programming, even if you think you are correct. *(page 18)*

> The departments did not have evidence that other firms were successfully using marketing research to increase sales and profits. We, of course, could not disclose how a number of our projects had done just that. *(page 21)*

> "We have never done a good enough job of promoting our industry to the general public. We count on them for participation in our research efforts and they are our lifeline to data." *(page 28)*

> Physicians expect reps to provide updates: thoroughly but quickly; without bashing the competition; that will differentiate the product; and in a way that assure them that the rep is NOT trying to tell them how to practice medicine! *(page 47)*

>>> Enter to win!

A free community Web portal with the purchase of a license to PanelPortal™, Toluna's survey scripting and panel management technology - a value of up to $30,000.

Contest entrants who purchase a PanelPortal™ license before November 30 will receive a free community Web portal. Provide your custom panelists with a front-end member Web site at no cost! All registrants will receive a copy of Toluna's "Online Communities, You Can Listen, But Can You React?" webinar and presentation.

By upgrading your existing custom panel to a custom community you'll give participants a more rewarding experience and the ability to take on-site polls and interact with other members. Best of all, you'll benefit by receiving richer qualitative and quantitative feedback than ever before.

Toluna
In touch with people

Toluna's PanelPortal™ - Unrivalled Customer Feedback . . . at Your Fingertips

For more information visit www.toluna-group.com.

To register, send an e-mail to contest@quirks.com with your complete contact information. Please include "PanelPortal Contest" in the subject line. Deadline to enter is October 31, 2011. The winner will be selected at random and announced in the December issue of *Quirk's*.

Congratulations to July's winner, Wendy Bernstein of Myrtle Beach Area Chamber of Commerce, Myrtle Beach, S.C. July's prize was a six-month subscription to Firefly Surveys from Vision Critical.

Congratulations to August's winner, Amy Lee of Fiskars, Madison, Wis. August's prize was $1,000 in free sample from Vision Critical's National Panels.


United States

SSI Congratulates the Winners of the Second Annual

SSI QUEST™ Awards

As market researchers, respondents are our most valuable assets. The SSI QUEST (Questionnaire Experience Satisfaction Tool) Awards honor those forward-thinking companies whose creativity and excellence in survey design led to the most engaging research experiences for respondents around the world. This recognition of our winners' outstanding performance is not based on our opinions but on the self-reported scores of our industry's most important shared resource—our research participants.

Please join SSI in congratulating the companies who are leading the way in the research community's ongoing quest for the optimal survey experience. We applaud their mastery of survey creation—and their commitment to respondent satisfaction.

Research Study Winners:

Best in QUEST: **Data100 Market Research Co. Ltd**

QUEST Americas: **InfoTrends**

QUEST Asia-Pacific: **Data100 Market Research Co. Ltd**

QUEST Europe: **Opinion Matters**

Product Placement Winners:

QUEST Americas: **StrataVerve, Inc.**

QUEST Europe: **GfK Custom**

QUEST Asia-Pacific: **Nielsen Bases**

Pure Science SSI

info@surveysampling.com | surveysampling.com