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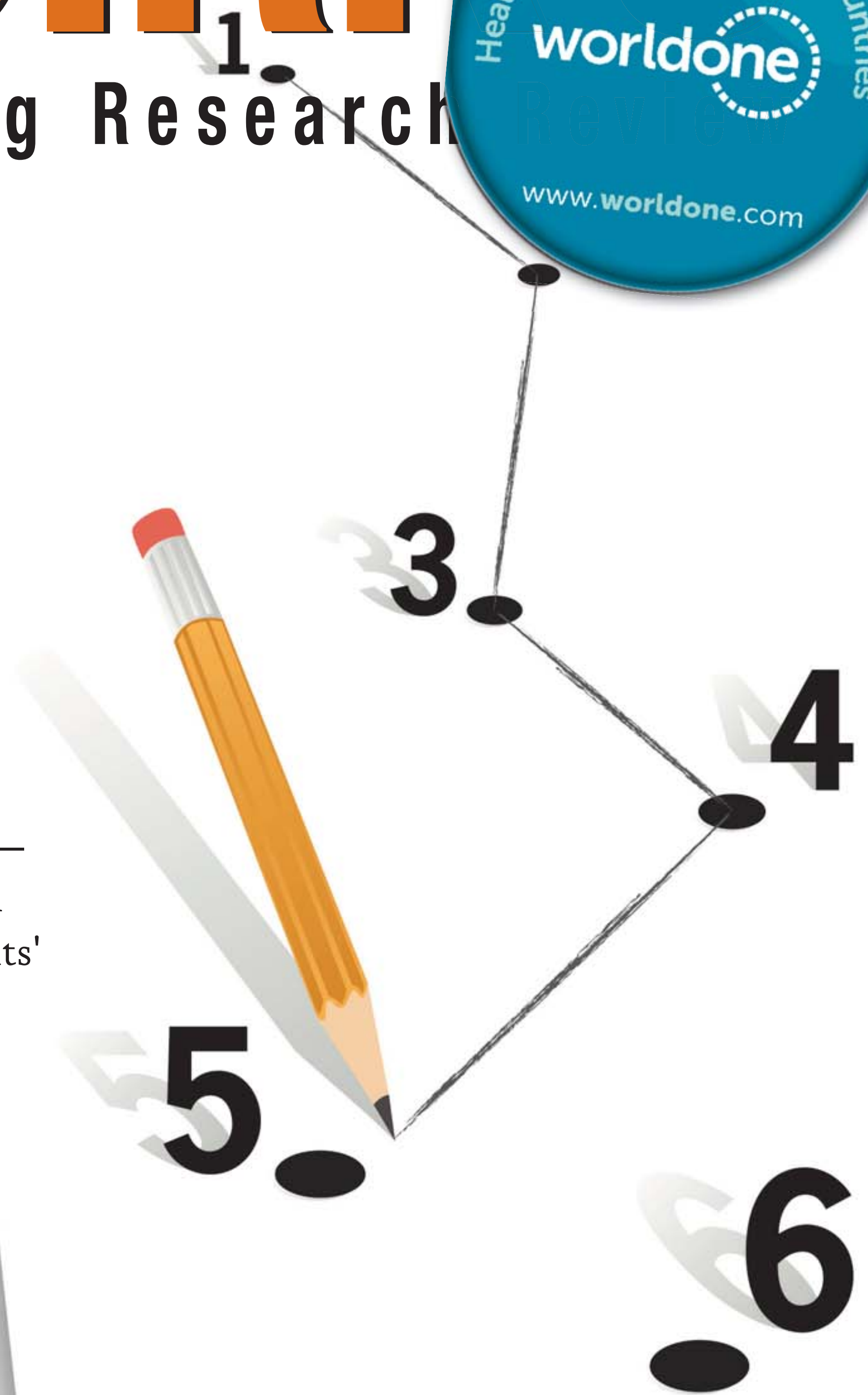

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CONTENTS

Quirk's Marketing Research Review
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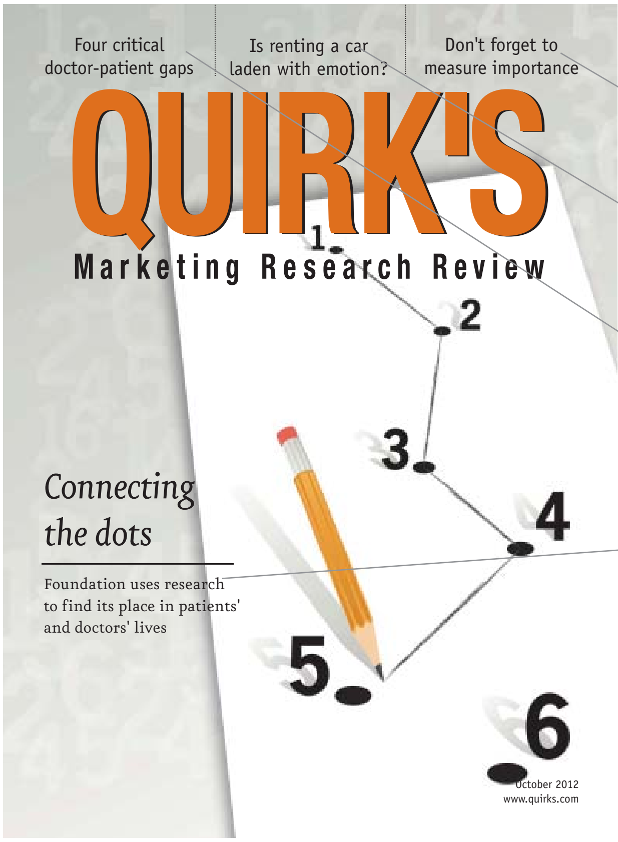

page 58
page 68
page 46
page 30

DEPARTMENTS

ON THE COVER

case study

CASE STUDY

TECHNIQUES

COLUMNS

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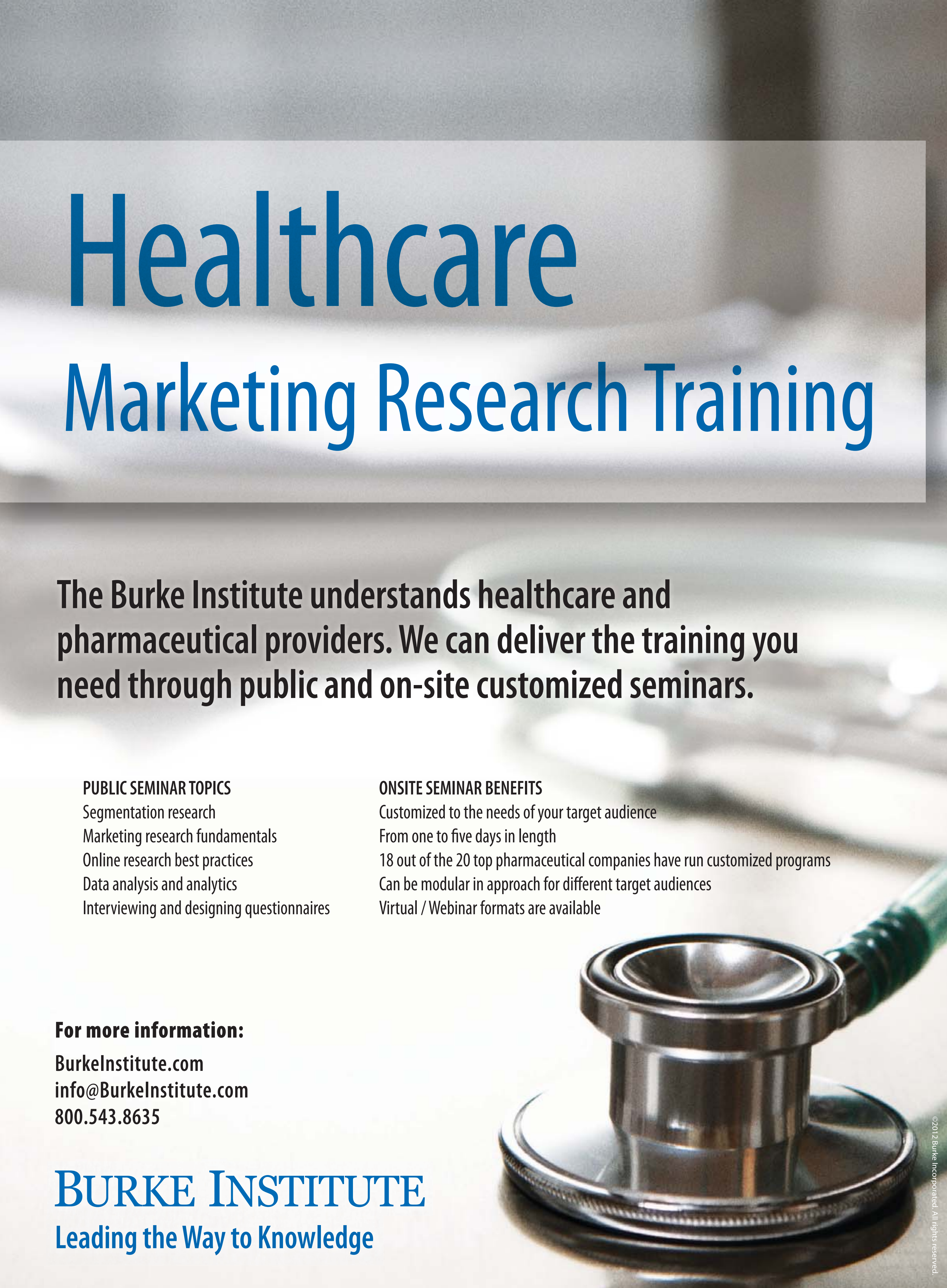
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Over the past few years, Quirk's has become so much more than a magazine. No longer are we simply pushing the best market research content to your mailbox or in-box. We invite you, our readers, to participate and interact with us and your peers! Join the discussion through any or all of the following vehicles:

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••• corporate image

Consumers forgive trusted companies – once

In the age of recalls and lawsuits, some companies who've come under fire have lived to tell the tale (think Toyota) while others have been nearly obliterated (think Pinto). This raises the question: When do consumers not blame a company for defective or dangerous products?

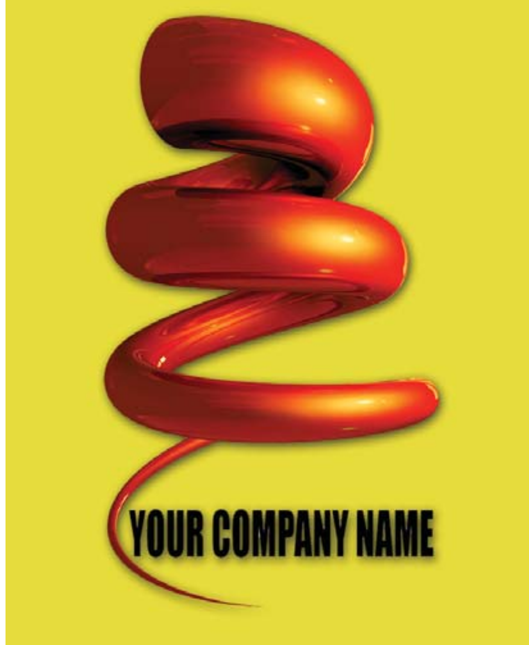
According to a study from Jing Lei of the University of Melbourne, Niraj Dawar of the Ivey Business School in Canada and Zeynep Gurhan-Canli of Koc University in Turkey, the answer depends on whether the company is well-liked, whether defective products are common in its industry and whether this is the first instance of a defective product at the company.

The study results demonstrate that well-liked brands find that their reputation pays off during a product recall or product-harm crisis. Consumers are much more likely to seek out other possible causes for the defective or dangerous product, refraining from immediate blame. Companies that are less well-liked do not enjoy this consideration.

In industries where recalls are common (i.e., toys, children's products, automobiles, health care products, etc.), consumers are less likely to lay blame on a specific company if similar incidents have plagued other companies. Again, companies that are not well-liked to begin with don't benefit in this way.

Where recalls are less common, a product-harm crisis stands out and requires explanation. But even here, consumers will treat a recall from a well-liked company as an exception, a rarity or accident, but blame a less well-liked company for a similar incident. However, even well-liked companies are excused only once; repeat incidents will not be seen as an exception or accident.

quirks.com/articles ID 20121001



••• branding research

Is your logo deterring customers?

It's an adage we've all heard before: Image is everything. And it turns out that's especially true when it comes to company logos. A good logo is great but a logo that consumers don't like can do some serious damage, as 41 percent of Americans don't trust companies whose logos they don't like, according to research from The Logo Company, New York. Furthermore, one-third went so far as to say that they wouldn't buy or use something from a company whose logo they didn't like.

When asked why they wouldn't trust a company whose logo they didn't like, 63 percent said it was because it made the brand look cheap if they had a badly-designed logo. Respondents were then asked to state the main reason they chose a new brand of product, with 59 percent saying it was the packaging while 38 percent said it was the logo.

When asked what they thought made a good logo, 44 percent of people said they liked it to look simple, while 41 percent thought color was more important.

EXPLORE THE ART OF

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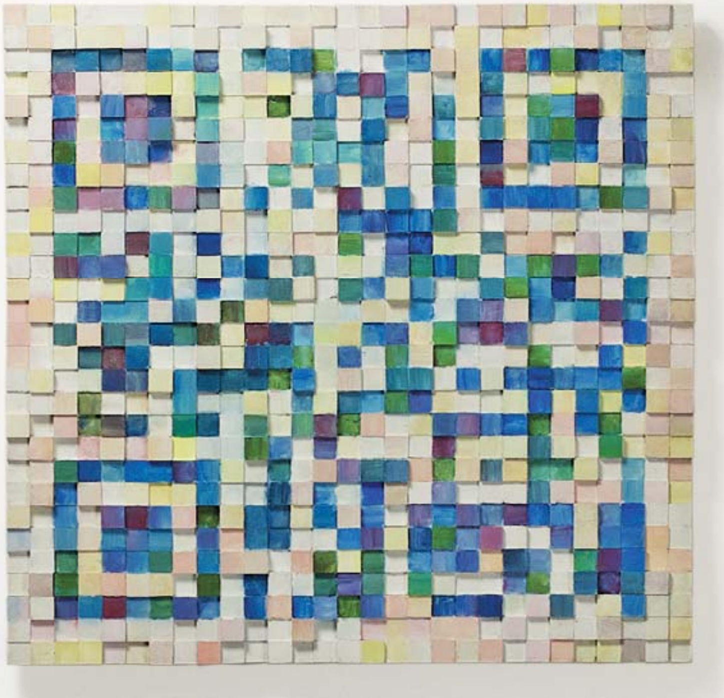

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REVELATION®
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By Joseph Rydholm, Quirk's Editor

These researchers risk their lives to gather data

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Joe Rydholm can be reached at joe@quirks.com

While the 2012 ESOMAR Congress in Atlanta last month was stimulating and energizing – lots of discussion of where marketing research is now and where it needs to go – it was also unexpectedly moving.

Among the conference tracks on the future of research and related topics were sessions celebrating bravery in marketing research. While many presenters over the three days I was there spoke in life-or-death terms about the future of research – if we don't evolve, we will die, etc. – two compelling presentations in the bravery track addressed real life-or-death matters and quickly put all of the other portentous talk into perspective.

Catalina Mejía of Bogota, Colombia, research firm YanHaas and Rafiq Ullah Kakar of Opinion Research Center of Afghanistan (ORCA) presented sobering portraits of conducting research in their respective countries. In both cases, interviewers faced harassment, intimidation, kidnapping and, in Afghanistan, death at the hands of Taliban soldiers.

Both spoke with admirable calm about the struggles of their respective teams. In Mejía's case, during 2010-2011, her firm was asked by the Colombian military to conduct 7,000 interviews in 68 small towns across Colombia to obtain citizens' impressions of the current state of things and how they view the role and presence of the military. The project was difficult from the very start: the first interviewing site was the town where the guerilla group Revolutionary Armed Forces of Colombia – People's Army (better known by its Spanish acronym FARC) was formed in 1964.

Along with the constant specter, real and threatened, of kidnapping and other personal harm, interviewers' movements were constantly shadowed. They were interrogated by FARC members. They faced landslides, washed-out roads, unmarked or poorly-marked houses and respondent hesitancy.

Kakar's teams faced their own set of problems in Afghanistan: corruption; ethnic, linguistic and gender differences; extensive illiteracy; suspicion of and outright hostility toward research; severe cultural restrictions on access to households; threats from the Taliban (including ominously-named "night letters," which urged the interviewers to stop doing research – in other words, stop spying for the international forces). Tribal elders had to be negotiated with in many towns in order to gain the correct password to enter the city.

Kakar spoke with pride of the creativity of the field workers as they strove to complete the interviews and keep themselves out of harm's way. Researchers had to slay a sheep before a tribal elder as a show of apology in order to free an interviewer who was being held. Another interviewer, seeing Taliban members approaching, wrapped up her questionnaires in a cloth and began kissing it to make the Taliban think she was carrying a holy book.

Alas, their efforts were not always successful: In 2010 a young interviewer named Hosiy Sahibzada was killed in Kandahar City.

Session host Vinay Ahuja of Procter & Gamble, UAE, struck the perfect tone in his introductions and during the post-presentation Q&A, reflecting the audience members' awe and appreciation for what Mejía and Kakar were relaying. Indeed, before the panel discussion following both presentations, he called for 15 seconds of silence to honor the memory of Sahibzada and another ORCA researcher who had been killed.

Without hesitation

When Ahuja asked during the panel discussion if it was all worth it, both Mejía and Kakar answered yes without hesitation. "The people of Afghanistan need to have a voice," Kakar said. "And we are helping give them one."

His comment echoed one of the oft-cited cultural benefits of research: that it "gives consumers a voice" and improves their lives by helping companies create more useful products and services. Research surely delivers there. But after listening to Mejía and Kakar, I don't think I'll ever think of that phrase in quite the same way.

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IN FOCUS

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

Q // Survey Monitor

••• grocery/supermarket research

New habits die hard

Private-label still gaining ground over brand-name CPG

The recession-born threat of private-label brands to brand-name products shows no sign of relenting, as 64 percent of shoppers admitted that their grocery carts were at least half-full of store-brand products and 39 percent said they have increased their purchase of store-brands in recent years as a result of the tough economic times, according to a study from New York consulting firm Accenture. Further, 77 percent of shoppers said they would not decrease the amount of store-brand products they buy even if their disposable income were to return to the same level as it was before the economic downturn.

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Price remains the key factor in the majority of store-brand purchases. Two-thirds of shoppers said they buy store-brands because they are cheaper. Also, while 87 percent of shoppers said they would buy more brand-name products if they were offered at the same price as the comparable store-brand, more than half (51 percent) said that it would take a permanent price reduction of the brand-name product – to the same price as the store-brand – to persuade them to return to purchasing the brand-name product.

The growing perception of trust, quality and preference for private-label products should be of most concern to consumer goods companies that are competing with stores for the same shelf space. Half of consumers surveyed buy store-brand products because they perceive the quality to be just as good as the brand-name equivalent; 42 percent buy a private-label product because they trust that particular store's brand; and 28 percent simply prefer the store-brand product to the brand-name product. In fact, only 9 percent claimed not to buy store-brands because they felt that the quality or taste was inferior to the brand-name product.

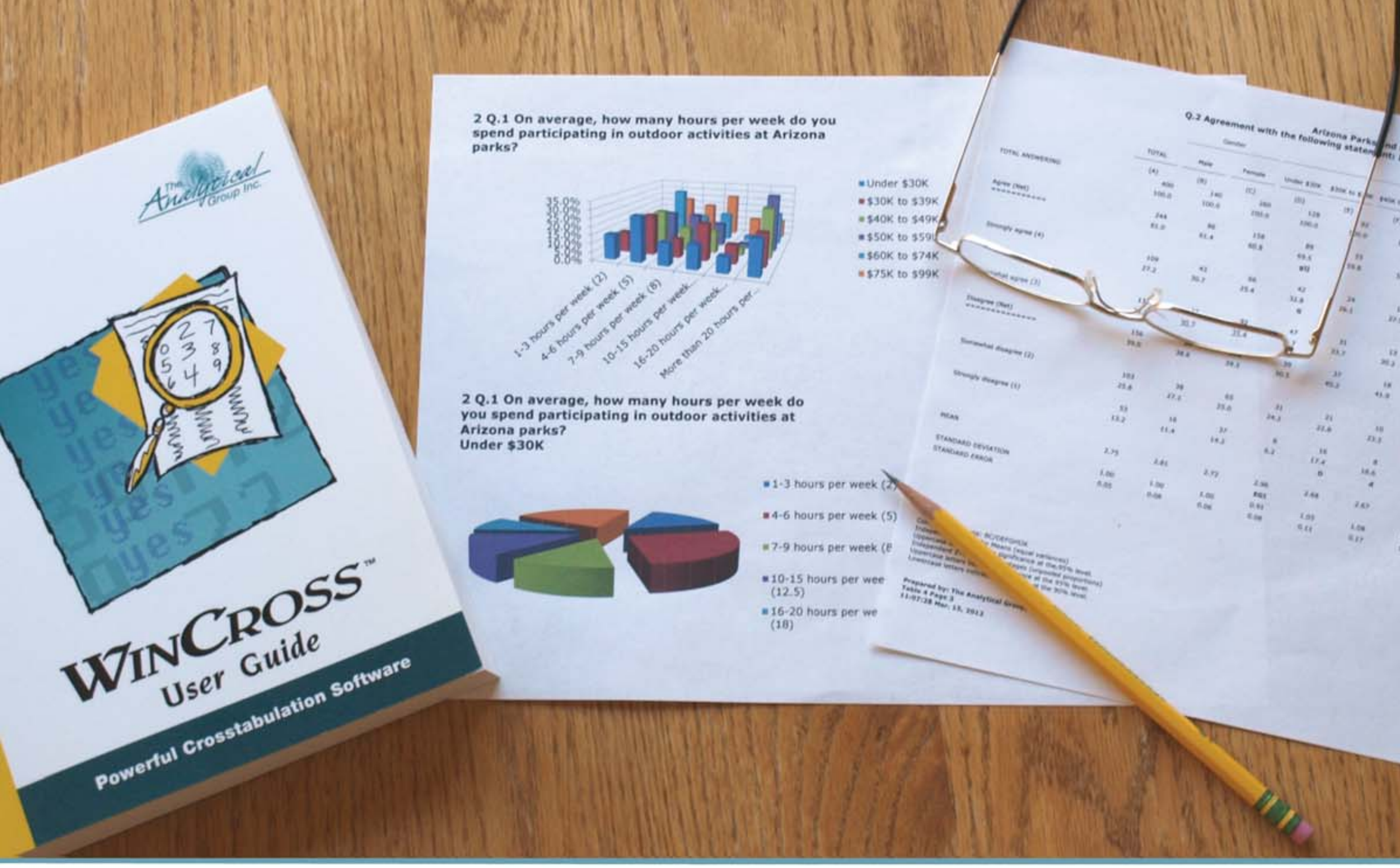
Consumers believe that stores have improved the variety and appeal of their range of store brands. Forty-eight percent of shoppers believe that stores now offer a greater number and variety of store-brand products and more than one-third see store-brand products as simply another brand on the shelf.
www.accenture.com

•••asian-americans

America's highest achievers

Asian-Americans set the bar for education, income and growth

A century ago, most Asian-Americans were low-skilled, low-wage laborers crowded into ethnic enclaves and targets of official discrimination. Today, Asian-Americans are the highest-income, best-educated and fastest-growing racial group in the U.S., according to data from the Pew Research Center, Washington, D.C. Asian-Americans are also more satisfied than the general public with their lives overall (82 percent


The Analytical Group Inc.
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Powerful Crosstabulation Software
2 Q.1 On average, how many hours per week do you spend participating in outdoor activities at Arizona parks?
2 Q.1 On average, how many hours per week do you spend participating in outdoor activities at Arizona parks?
Under $30K

vs. 75 percent), their personal finances (51 percent vs. 35 percent) and the general direction of the country (43 percent vs. 21 percent) and they place more value than other Americans do on marriage, parenthood, hard work and career success.

Asians recently passed Hispanics as the largest group of new immigrants to the U.S. and the educational credentials of these recent arrivals are striking. Sixty-one percent of adults ages 25-to-64 who have come from Asia in recent years have at least a bachelor's degree. This is double the share among recent non-Asian arrivals and makes the recent Asian arrivals the most highly-educated cohort of immigrants in U.S. history.

They also stand out for their strong emphasis on family. More than half (54 percent) say that having a successful marriage is one of the most important things in life; just 34 percent of all American adults agree. Two-thirds of Asian-American adults (67 percent) say that being a good parent is one of the most important things in life; just 50 percent of all adults agree. Their living arrangements align with these values. They are more likely than all American adults to be married (59 percent vs. 51 percent); their newborns are less likely than all U.S. newborns to have an unmarried mother (16 percent vs. 41 percent); and their children are more likely than all U.S. children to be raised in a household with two married parents (80 percent vs. 63 percent).

Asian-Americans have a pervasive belief in the rewards of hard work. Sixty-nine percent say people can get ahead if they are willing to work hard, a view shared by a somewhat smaller share of the American public as a whole (58 percent). And fully 93 percent of Asian-Americans describe members of their country of origin group as very hardworking; just 57 percent say the same about Americans as a whole.

For the most part, today's Asian-Americans do not feel the sting of racial discrimination or the burden of culturally imposed "otherness" that was so much a part of the experience of their predecessors. Compared with the nation's two largest minority groups – Hispanics and blacks – Asian-Americans appear to be less inclined to view discrimination against their group as a major problem. Just 13 percent of Asian-Americans say it is, while about half (48 percent) say it is a minor problem, and a third (35 percent) say it is not a problem.

About six-in-10 say that being Asian-American makes no difference when it comes to getting a job or gaining admission to college. Of those who do say it makes a difference, a slightly higher share say that members of their group are helped rather than hurt by their race. Those with less education are more prone than those with more education to say that being an Asian-American is an advantage.

Asian-American newlyweds are more likely than any other major racial or ethnic group to be intermarried. From 2008 to 2010, 29 percent of all Asian newlyweds married someone of a different race, compared with 26 percent of Hispanics, 17 percent of blacks and 9 percent of whites. Asian women are twice as likely as Asian men to marry out. Among blacks, the gender pattern runs the other way – men are more than twice as likely as women to marry out. Among whites and Hispanics, there are no differences by gender.

Despite high levels of residential integration and out-marriage, many Asian-Americans continue to feel a degree of cultural separation from other Americans. Not surprisingly, these feelings are highly correlated with nativity and duration of time in the U.S. Among U.S.-born Asian-Americans, about two-thirds (65 percent) say they feel like a typical American. Among immigrants, just 30 percent say the same and this figure falls to 22 percent among immigrants who have arrived since 2000.

Forty-three percent of Asian-Americans say Asian-Americans are more successful than other racial and ethnic minorities in the U.S, while 45 percent say they are about as successful and 5 percent say they are less successful. www.pewresearch.org

••• mobile research

Smartphone shortcuts

Mobile users circumvent online advertising with smartphones

While a majority of mobile users say they use their devices exclusively when it comes to Internet searches and accessing personal e-mail, it appears preferences for specific Web sites follow suit. Over half of consumers with smartphones or tablets would rather use these devices to access Google, their e-mail inbox and Facebook instead of using a desktop or laptop, which could present a challenge for advertisers and retailers, according to a survey conducted by Prosper Mobile Insights, a division of BIGinsight, a Worthington, Ohio, research company.

Although these consumers do not solely use a mobile device for certain sites, when given the choice, many will reach for a smartphone or tablet, thus avoiding traditional online advertising.

"For advertisers, it is important to note that some of the biggest sites may be seeing less traffic on computer screens and more on smartphones or tablets," says Pam Goodfellow, director, consumer insights, BIGinsight. "These shoppers are bypassing traditional banner ads, suggested and sponsored sites and many targeted social ads."

For Google, 45.4 percent prefer to use a smartphone, compared to 9.5 percent who prefer a tablet and 45.1 percent who prefer a desktop or laptop. For personal e-mail, 47.6 percent prefer a smartphone; 10.1 tablet and 42.3 percent desktop/laptop. Fifty percent prefer a smartphone to access Facebook, 12.5 percent tablet and 37.4 percent desktop/laptop. Retailer Web sites are where traditional computers are still holding their ground, as 67.4 percent prefer to access them using a desktop/laptop, compared to 20.5 percent who prefer a smartphone and 12 percent a tablet.

More than one-third of those who access an e-mail account for work prefer to do so using a smartphone while 9 percent would grab a tablet. Over 30 percent of LinkedIn users say they prefer a smartphone for access to the site, along with 12.4 percent who would choose to use a tablet. The remaining 57 percent prefer a desktop or laptop computer.
www.prospermobile.com

••• automotive research

Downsize, not downgrade

Overall appeal improves as consumers continue switching to smaller vehicles

As owners continue to shift toward smaller vehicles, they are finding that the ones they buy are often just as appealing as the larger vehicles they previously owned. According to the 2012 U.S. Automotive Performance, Execution and Layout (APEAL) Study from Westlake Village, Calif., research company J.D. Power and Associates, 27 percent of new-vehicle buyers who replaced a vehicle downsized, meaning they purchased a new vehicle in a smaller segment than the vehicle they replaced. In contrast, only 13 percent of buyers upsized, while 60 percent purchased a new vehicle in the same size segment as their previous vehicle.

"New-vehicle buyers who downsize are not making the sacrifice that they once were," says David Sargent, vice president, global automotive, at J.D. Power and Associates. "Automakers are heavily focused on providing the U.S. market with appealing smaller models and buyers may be surprised at just how good some of them are."

The vehicles currently being traded in for new ones are approximately six years old, on average. During that period of time, vehicle appeal overall has significantly increased and today's smaller vehicles are, in many cases, more appealing than the larger vehicles being replaced. In 2012, the average APEAL Study score for vehicles in the compact/subcompact segment is 765 points (on a 1,000-point scale), which is the same as the average for midsize vehicles in the study in 2008. Similarly, in 2012, the average APEAL Study score for vehicles in the midsize premium segment is 844, the same as the average for large premium vehicles in 2008.

The downsizing trend also has an impact on owner satisfaction with the fuel economy of their new vehicle. While overall vehicle appeal continues to improve, increasing seven points year over year, the greatest improvement is in fuel economy. Furthermore, 47 percent of owners say gas mileage was one of the most important factors in choosing their new vehicle, up from 40 percent in 2011.

Chevrolet received the highest number of segment awards of all brands included in the study for the Avalanche, Sonic and Volt models. Seven brands each received two model awards: Audi for the A6 and A8; Dodge for the Challenger and Charger; Ford for the Expedition and Flex; Kia for the Optima (in a tie) and Soul; MINI for the Countryman and Coupe/Roadster; Nissan for the Frontier and Quest; and Porsche for the Cayenne and 911. The Audi A8 achieved the highest APEAL Study score of any model in the industry in 2012.

Also receiving awards were the BMW 3 Series; Infiniti QX56; Range Rover Evoque; Mercedes-Benz SLK-Class; and Volkswagen Passat in a tie.

Porsche was the highest-ranking nameplate for the eighth consecutive year. Dodge, Jaguar and Ram achieved the greatest year-over-year improvements, increasing scores by 21, 20 and 19 points, respectively.
www.jdpower.com

••• teens

A trifecta of influences

Word of mouth, advertising and reviews persuade teen spending almost equally

In this Information Age, tech-flooded teens have access to many forms of communication that work together to influence their spending decisions. A study from Port Washington, N.Y., research company The NPD Group shows that 21st-century technology, straightforward advertising and age-old personal recommendations work together as the three factors most influential in helping teens decide what items to buy. Word-of-mouth marketing wins out as the most persuasive at 36 percent, compared to 32 percent for advertising and 29 percent for online advertising.

"In true adolescent fashion, teens continue to be influenced by their friends when it comes to trends," says Marshal Cohen, chief industry analyst, The NPD Group, Inc. "Teenagers care 20 percent more than the average shopper about brands, most likely due to peer pressure."

Even though shopping for brand names is more important to teenagers than it is to the average shopper (42 percent for teens vs. 38 percent for general population), teens still search for bargains while relying on adult income and approval of purchase.

Brand-savvy teens find more labels they desire for less at off-price retailers (32 percent) and outlets (30 percent) than at department stores and specialty retailers (28 percent each).
www.npd.com

IN FOCUS

Product and Service Update

••• political research

Measuring campaigns for campaigns

Real-time ad measurement for politicians and their opponents

Mountain View, Calif., research company Ace Metrix has launched Ace Metrix POLITICS, a real-time measurement of the effectiveness of campaign, issue and advocacy ads. Ace Metrix POLITICS is designed to deliver politicians insight into the performance of their own campaigns, as well as their competitors, allowing clients to determine what ad to invest in, what competitor messages to respond to and what messages are resonating with voters.

The data is accessed via a Web-based platform, through which clients can watch the ads; see the entire ad landscape via scatter plot; search and filter results by age/gender, political affiliation and other key attributes; and access verbatim consumer commentary.

Further, the company's mobile applications ensure data availability out on the campaign trail, whenever an ad breaks. www.acemetrix.com

quirks.com/articles ID 20121004

••• mobile research

A mix of methods

Research Now debuts broad platform of DIY mobile survey apps

Research Now, Plano, Texas, has launched Research Now Mobile, a platform designed to offer full survey functionality for quantitative research studies and qualitative surveys. Additionally, the Research Now Mobile platform offers mobile behavioral data collection via Research Now Mobile+, which collects permission-based mobile and tablet behavioral data. By automatically capturing a variety of data points, the Research Now Mobile+ platform aims to enable researchers to couple passive behavioral data with survey data.

The Research Now Mobile platform offers native app, Web app and tablet surveys that are compatible with iOS, Android, BlackBerry and feature phones. The platform also offers support for quantitative and qualitative question types, advanced survey logic, QR and bar code scanning, multimedia capture and questions using multimedia.

The Research Now Mobile platform offers more than 10 ways to launch a survey, including geo-fencing, geo-targeting, venue triggering, push notification, QR code trigger, diary studies, self-opted-in via short code SMS, SMS invites, in-app and mobile Web intercepts. Through its integration with foursquare, the Research Now Mobile platform enables venue-based survey triggering at approximately seven million venues worldwide. Furthermore, it has background location capture, providing the ability to automatically trigger surveys when panel members enter a specific location.

Ideal for surveys of 10 minutes or less in length, surveys are delivered directly to the user's handset and can be completed online or offline. Data is then delivered to clients in formats consistent with traditional online research. Developed for DIY research, the platform provides access to its Web-based iControl panel, which facilitates project execution. www.bethemobilebigkahuna.com

••• ad research

More than impressions

Ad measurement tool takes visibility into consideration

The GfK Group, a Nuremberg, Germany, research company, has launched DeliveryControl.dx, an instrument designed to measure the delivered ad impressions alongside the visibility of an ad by tracking browser activity (browser window or active tab); the position of the advertisement on the Web site; the user's screen resolution; and any scrolling by the user.

The reporting displays the different levels of visibility of the advertisement – whether it was fully displayed (100 percent) or if at least 90 percent, 75 percent, 50 percent or 1 percent were visible on the user's screen – and the average view time for each of these visibility levels. Furthermore it can be segmented by site, channel, placement, ad format and creative. To measure the visibility and view time, GfK applies nurago's tagging system.

DeliveryControl.dx aims to provide a measurement of the actual view time an ad receives, plus immediate reporting. www.gfk.com

••• mobile research

VOC for iOS

Verint expands offline mobile survey offering

Verint Systems Inc., a Melville, N.Y., research company, has released an offline mobile app for iOS, in addition to its Android solution. Available

through its Vovici Enterprise Feedback Management solution, it is intended to offer integrated, offline mobile surveys and allow users to gather survey results offline, then sync them with the Web-based survey application when an Internet connection is available; view and test surveys directly from an iOS or Android device; run the same survey simultaneously on the Web and offline; access statistics on all surveys, including status and response rates, survey question responses and campaign distribution statistics, such as sent, open and completed rates; and establish permissions-based access with multi-workgroup capabilities.

Vovici mobile products are available through the iTunes Store and the Android Market on Google Play.
www.verint.com

••• media research

Promo power

Promo OptimiXer aims to evaluate viewer and listener follow-through

Columbia, Md., research company Arbitron Inc. has unveiled its Promo OptimiXer service, a single-source, cross-platform ratings tool designed to help broadcast and cable networks evaluate the return on investment that radio and television tune-in campaigns deliver in terms of audience ratings to the programs being promoted.

Based on the viewing and listening behavior of the approximately 69,000 Portable People Meter (PPM) panelists in 44 top U.S. media markets currently measured by the Arbitron PPM service, the Promo OptimiXer service provides evaluation metrics of program episode reach, program promotion reach, conversion percent, program promotion impressions and projected audience reached by program and promotion. It also answers questions about the promotion effectiveness, including: Who was exposed to the promotion campaign? On what media? And how often? Unduplicated reach and frequency can be estimated separately by each component of the campaign (e.g., radio tune-ins, DJ chatter, in-house promos, paid commercials on other channels), as well as for the entire campaign.

Promo OptimiXer also assesses how many of those exposed to the promotion campaign watched the measured episode. This is the key ROI measure for each component of the promotion campaign and for the campaign as a whole.
www.arbitron.com

••• social media research

All about the ME Statement

PhaseOne debuts suite of four solutions

Los Angeles research company PhaseOne has rolled out a suite of social media solutions designed to analyze how a brand's messaging plays to consumers across multiple social media disciplines, including brand communications, competitive communications and social media engagement, to provide the insights in crafting strategies and messaging platforms. The four different social media solutions can be used together or independently of one another.

PhaseOne's social media services focus on a key driver or ME Statement (the idealized self embodied by the brand) that exists among the most socially-engaged brands. PhaseOne's ME Statement development and monitoring service aims to assist in mining consumer data, mapping it against the brand's equities within its category to identify relevant and distinctive ME Statements; ensure that a company's chosen ME Statement is effectively expressed across all touchpoints; and offer social media monitoring to track the target audience acceptance of the brand's ME Statement.

With the Social Media Brand Communications Audit, PhaseOne determines whether a brand's messages are influencing online conversations and if the conversations are reinforcing or damaging brand equities (i.e., sentiment, likes and dislikes). Based upon this analysis, PhaseOne provides recommendations on how to shape and influence future brand messaging strategies.

The Social Media Competitive Communications Audit monitors competitive conversations and determines whether they are reinforcing or damaging brand equities. Based upon this analysis, PhaseOne provides recommendations on how to shape and influence future competitive messaging strategies.

Finally, ongoing monitoring and insights of social media sentiment track messages being played out in the social media space and analyze a brand or competitor's sentiment, likes or dislikes. PhaseOne then examines events, issues or other topics being circulated online to determine their impact on a brand's social media presence. These findings can be reported on a daily, weekly or monthly basis or on a custom delivery schedule.
www.phaseone.net

••• social media research

Turning conversation into dialog

Listen & Act allows companies to use social media data for CRM

Oslo, Norway, research company QuestBack has introduced Listen & Act, a social engagement tool that aims to allow organizations to transform social media messages into dialogs and integrate these insights into customer relationship management (CRM) data.

Listen & Act is designed to enable businesses to quickly sift through mes-

sages, view levels of influence and utilize engagement tools, such as surveys and communities, to create unique experiences for their customers based on inquiries and preferences. Additional features include feedback management through keyword monitoring and grouping of common themes; integration with the QuestBack feedback and social engagement platform; integrated sentiment analysis and Klout score; and a single view of the customer with the QuestBack people data hub, which combines unstructured social media data with structured CRM data.
www.questback.com

••• mobile research

Multiplatform for mobile

Lumi releases DIY tool

Lumi Mobile, a London mobile technology company, has launched Lumi SURVEY, a self-service mobile survey tool created specifically for market research and deployable across all major mobile operating systems, including iOS, Android, BlackBerry and Symbian.

Lumi SURVEY's apps work with Internet-enabled feature phones and smartphones and offer online and offline survey completion. Lumi SURVEY is also available as a customizable white-label solution.

Market researchers can create surveys using a variety of question types and displays, with more than 35 languages supported. Real-time data and completed surveys are viewable on Lumi's online dashboard, while final results may be exported direct from there in industry standard formats (SPSS or CSV).
www.lumimobile.com

••• text analytics

From clouds to Trees

Text visualization and search tool to give greater context

Portland, Ore., research company Revelation has debuted Word Trees, a text visualization and search tool, which is integrated with the Revelation Project online qualitative research platform. Word Trees is designed to save researchers the need to export their data to another tool to conduct content analysis. Going beyond word clouds that show frequency of mentions, Word Trees reveal all the different contexts in which a word or phrase appears within a body of text, showing the difference between apple the fruit and Apple the brand. Researchers can tune Word Trees by participant, activity, segment and other search filters.
www.revelationglobal.com

••• physician research

Scoring with docs

New offering to track real-time physician response to pharma marketing

Des Moines, Iowa, marketing consultancy RMi has introduced IntelliScore, an engagement quotient that aims to provide clients both a real-time snapshot of how physicians are engaging with their marketing efforts and an assessment of the quality of that engagement. This scoring algorithm tracks physicians' receptivity to and engagement with marketing methods and brand messages across a variety of channels, which can include e-mail, direct mail, surveys, sales calls, speaker events and more. The effectiveness of each effort is scored by weighing the value of actions taken, information provided, channel preferences, preferred messages and how they correlate with the physician's sales or prescriptions.
www.rmarketing.com

••• online research

Intercepting visitors

Qualtrics offers IT-free solution to target Web site visitors

Provo, Utah, research software company Qualtrics has released Qualtrics Site Intercept, an online tool designed to allow brands to alter Web site content on the fly – without tapping IT resources – to deliver custom content and gather visitor feedback. Using a variety of criteria such as time of day, geo-location, visit history or shopping cart content, Qualtrics Site Intercept lets brands display custom messages, surveys, promotions and other content to Web site visitors in real time.

The interface requires no programming and marketers can use Qualtrics Site Intercept to create the content, choose how they want it to display on the site and implement rules for when and where it appears.
www.qualtrics.com

••• eye-tracking research

The missing link

New technology to determine when ads are actually seen – and how they perform

New York research company EyeTrackShop has debuted its real-CPM technology, an offering designed to allow advertisers and agencies to audit their online branding campaigns and optimize their spending by breaking down the results on different sites and ad placements by calculating online brand campaigns across various online advertising platforms.

The realCPM is intended to serve as the missing piece between technical measures and traditional post-testing. By using eye-tracking technology to confirm which ads are seen the most and then saving information on ad content, the solution can tell if a specific campaign is visually over- or underperforming compared to similar campaigns in the same industry, while indicating what creative content works best on different media placements.

This sort of performance measurement will also allow companies to put a real-time price tag on the ads they produce as the amount of eyes that land on ads are monitored and comparative percentage-based stats record the results. These success rates are then assessed against different options for placing an ad on the page, as well as factors like time of day, gender and media outlet focus.
www.realcpm.com

••• ad research

Hybrid copy-testing

Ad Assess combines quant and qual

The Pert Group, a Farmington, Conn., research company, has introduced Ad Assess, an approach that integrates quantitative and qualitative research for screening creative concepts. Ad Assess is designed to hardwire the two disciplines together to conduct qualitative interviews with the same consumers who did the quantitative.

Ad Assess can be used to test multiple ad concepts, for multiple media at any stage in the creative process and typically takes three-to-four weeks to complete.
www.thepertgroup.com

••• reporting software

E-mail for Beacon

Solution adds e-mail campaign management

Fresno, Calif., research company Decipher Inc. has launched an e-mail campaign manager tool as part of its Beacon market research software suite. The feature is intended to allow users to create and customize e-mail campaigns to potential research respondents.

The e-mail campaign manager can be programmed to send invitations to e-mail lists at scheduled times, while also sending reminders to those lists and automatically filtering out respondents who have already completed the surveys. Opt-outs are automatically managed and can be reviewed by the senders. Other features include reusable campaign content and design templates; accessible field reporting that includes statistics on bounce-backs and open rates; list uploads from Excel or tab-delimited formats; and a campaign-specific drop-down menu with actions for editing, uploading, sending and reminding.
www.decipher.com

••• Briefly

■ New York research company Ipsos InnoQuest has released Vantis*Optimize, a new product development optimization solution. Vantis*Optimize is designed to help maximize innovation potential for clients introducing non-FMCG products by identifying the optimal feature and price configuration for new product or service concepts. The result is a simulator which provides clients with their potential sales, revenues and profit levels under different marketing scenarios, along with price elasticity, feature utilities and targeting indicators.
www.ipsos.com

■ Chicago research company CarbonSix has released Over the Shoulder, a smartphone-enabled, digital ethnography tool. The technology connects market researchers with recruited respondents, who are paid to download its app via iTunes or the Android Market. After downloading, the app lives in the respondent's pocket, establishing a presence for market researchers to send questions and receive answers as text, multiple choice, photos or as full audio or video.
http://c6research.com

■ Cincinnati research company Ascribe has bundled its analytics and visualization tools Ascribe Coder, Ascribe Accelerator, Ascribe Inspector and Ascribe Illustrator into one platform, dubbed Ascribe Intelligence. The suite of tools is intended to gather, classify, code and visualize verbatim feedback, regardless of industry, channel or language.
www.goascribe.com

■ New York research company Ipsos Loyalty has debuted Wallet Allocation Optimizer (WAO!), a solution designed to help turn customer relationship management into increased share-of-wallet. WAO! aims to provide executives with a customer relationship metric and system of understanding related to financial performance and business success.
www.ipsos.com/loyalty

■ Fresno, Calif., research company Decipher has developed a transition plan for companies seeking to license its market research platform, Beacon. The plan allows companies in existing research software contracts to license and begin using Beacon without paying licensing fees until their existing software contract expires. The Beacon licensing contract will begin when any incumbent contract ends. Training and help desk access are included in the conversion program at regular rates.
www.decipher.com

■ Harpeth Marketing, a Franklin, Tenn., marketing firm serving the market research industry, has added marketing and sales audits to its service offerings. During an audit, Harpeth evaluates a company's marketing and sales efforts and makes recommendations on what needs to be done to improve efficiency and effectiveness. Level 1 Audits address a company's marketing and sales initiatives, revenue history and client base. Level 2 Audits build on Level 1 by surveying a company's clients and ex-clients and secret shopping key competitors.
www.harpethmarketing.com

■ Chicago research company Ipsos ASI has debuted the next generation of its Brand Value Creator, a tool designed to fuse advertising research experience and global databases to improve brand monitoring and tracking.
www.ipsos.com/asi

■ San Francisco research company userlytics has launched a feedback offering designed to allow users to conduct up to seven free Web site tests per month by registering for the Basic Plan with an e-mail address and name.
www.userlytics.com

■ Boston product development company Halexi LLC has developed PanelFinder.com, a quote management application designed to streamline the RFQ process between full-service market research firms and panel providers.
www.panelfinder.com

■ Seattle research software company Survey Analytics has launched LifeMetrix, a service designed to allow clients to collect passive data from panelists' mobile devices.
http://lifemetrix.com

■ Shelton, Conn., research company SSI has rolled out a U.S. wireless screening service. SSI Wireless Screener is a stand-alone, post-production process designed to identify U.S. cell phone numbers with activity within an RDD cell phone sample. The process maintains the integrity of SSI's probability methodology and complies with the Telephone Consumer Protection Act. SSI Wireless Geo ID is a stand-alone, post-production process used to identify the billing zip code of the U.S. cell phone number.
www.surveysampling.com

■ New York research companies Scarborough Research and GfK MRI have partnered to combine GfK MRI's attitudinal data points with Scarborough's local and national consumer databases. Dubbed Scarborough/GfK MRI Attitudinal Insights, the offering is designed to examine consumer attitudes in conjunction with media consumption and purchasing behavior.
www.scarborough.com

■ Wilton, Conn., research company Toluna has launched Toluna Mobile Omnibus, a service designed to allow companies to ask up to 10 questions of 500 U.S. mobile respondents via mobile devices. Data is reported by age, gender, region, marital status, income, education, employment status, household size and the number of children in the household.
www.toluna.com

■ Mapping Solutions, Detroit, has released version 3.0 of its MapperG offering, combining Google Maps with Pitney Bowes MapInfo Professional, featuring international street-level geocoding. MapperG Basic includes unlimited Street, Arial, Hybrid and Terrain maps from Google Maps and single-address geocoding. MapperG Premium features international street address batch geocoding for up to 1,000 records per day, in addition to automatic map refresh.
http://mapperg.com

■ New York researcher The Nielsen Company has debuted Nielsen Online Audience Segments – TV Viewing, an

offering that uses Nielsen's data assets and TV knowledge to correlate how people watch TV with how they behave online. Nielsen uses a unique, representative sample of both TV and online panelists, providing a privacy-protected source for segment models based on viewers, rather than households.
www.nielsen.com

■ Reston, Va., research company comScore Inc. has launched comScore TabLens, a monthly syndicated service intended to provide insights into U.S. tablet ownership and usage.
www.comscore.com

■ Oslo, Norway, research software company Confirmit has launched Confirmit Voices, a voice-of-the-customer (VOC) engagement model built around a six-stage process: define, design, implement, analyze, act and review. It aims to help organizations to develop clear objectives and design a VOC program mapped to the customer journey. Confirmit Horizons powers the platform using multichannel data collection, including Web, mobile, telephone and paper, as well as analysis and reporting tools.
www.confirmit.com

■ Copenhagen, Denmark, research company iMotions has added emotional insights from Waltham, Mass., research company Affectiva's Q Sensor to its eye-tracking software solutions. The addition of Affectiva's Q Sensor, a wearable, wireless biosensor to measure electrodermal skin activity, aims to expand the real-time emotional insights provided by the iMotion's eye-tracking platform.
www.imotionsglobal.com

■ Cambridge, Mass., research company MarketSight LLC has released MarketSight 9.1, the latest version of the company's survey analysis software. In addition to supporting the Google Chrome Web browser, version 9.1 features the ability to export dashboards to PowerPoint; batch create charts from crosstabs; and add a dashboard to the home page within the solution.
www.marketsight.com

■ New York researcher The Nielsen Company has expanded its Nielsen TV Brand Effect service to China and Germany. The solution is designed to monitor consumer response in real time by delivering metrics on a TV ad's break-through or resonance, enabling in-flight or post-campaign optimization.
www.nielsen.com

■ Research companies Millward Brown, New York, and Affectiva, Waltham, Mass., have added facial coding to Millward Brown's Link ad copy evaluation and optimization solution for emerging markets.
www.millwardbrown.com

■ Irving, Texas, research company Epsilon has added a data dimension, Market Trend, to its TotalSource Plus consumer database. This sixth dimension aims to expand targeting opportunities for marketers based on an individual's propensity to engage or purchase.
www.epsilon.com

■ Austin, Texas, research company Bazaarvoice and London consulting company Booz & Company have launched the Digital Customer Centricity Profiler, a service designed to help companies pinpoint the digital capabilities of their organizations compared with those of leaders in their market and in other industries. The Profiler combines Booz & Company's strategy expertise with the social insights derived from the 330 billion customer conversations served from the Bazaarvoice social platform.
www.bazaarvoice.com

■ Portland, Ore., research company Webtrends has released a free app for iPad designed to enable marketers to view trending data from Web sites, Facebook, Twitter and YouTube. The app is available via iTunes. For current Webtrends customers, the app also accesses and integrates data from Webtrends' Analytics 10 platform.
www.webtrends.com

■ Reston, Va., research company comScore Inc. has received accreditation for elements of its validated Campaign Essentials platform from the Media Rating Council, New York; the Audit Bureau of Circulations U.K.; and the Información y Control de Publicaciones, a Spanish industry body that verifies circulation and audits Web analytics and online audience measurement solutions.
www.comscore.com

■ The Learning House Inc., a Louisville, Ky., online education solutions company and Aslanian Market Research, Hoboken, N.J., have published Online College Students 2012, a study that details the results of surveys with 1,500 prospective and current online students nationwide.
www.learninghouse.com/study

■ Kinesis Survey Technologies LLC, Austin, Texas, has published a white paper, titled Online Survey Statistics from the Mobile Future. The white paper includes statistics about Kinesis' online survey platform usage. It is available for free download at www.kinesissurvey.com/whitepapers.

■ Paris research company Ipsos has launched its Online Audience Panel Data in Jordan.
www.ipsos.com

■ Needham, Mass., research company in4mation insights has launched a new Web site as part of its rebranding at www.in4ins.com

■ Encino, Calif., research company MMR Strategy Group has launched a new Web site at www.mmrstrategy.com

■ C+R Research, Chicago, has expanded its YouthBeat study to offer YouthBeat Jr.: The Preschool Edition, a syndicated study of preschoolers ages two-to-five and their parents.
www.youthbeat.com

■ Honeoye Falls, N.Y., research company KJT Group Inc. has debuted a new company logo and tagline: Insight By Design.
www.kjtgroup.com

■ Butler, Pa., research company D. M. Harris Associates celebrated its 30th anniversary in July.

Combining attitudinal data and behavioral data for meaningful analysis

| By Abigail Lefkowitz

snapshot

The author outlines methods of analyzing customer satisfaction data that can help uncover overlooked opportunities for growth and highlight neglected areas that require immediate attention or long-term improvement.

quirks.com/articles
ID 20121005

Customer satisfaction (C-SAT) surveys aim to investigate aspects of the user experience but I have found that most surveys fall short of presenting a multifaceted view of the situation at hand. C-SAT scores do not always show much change from month to month, making it tricky to produce a meaningful analysis from satisfaction data alone. Often, a second set of data is necessary to layer upon customer satisfaction data in order to expose deeper meaning. Data from Web analytics tools can provide that layer.

In this article, I will discuss: the challenges faced when attempting to find meaning in C-SAT data; how to combine C-SAT data with Web analytics data to gain more useful insights; and the most appropriate types of analyses to conduct.

The problem

A customer satisfaction score is a measure of how well a company is satisfying its customers. This score is often a calculation based on a number of factors and is compiled from surveying customers either on- or offline.

C-SAT scores can be compared across companies within the same industry using the standard scoring system set by the American Customer Satisfaction Index (ACSI). The score is a number ranging from 1-100 and is calculated based on a set of scaled survey questions. A lower score indicates customer dissatisfaction while a higher score implies customers are generally satisfied. While this ACSI score is easily comparable on a nationwide basis, most companies also have internal reports of C-SAT that are derived from different metrics of their preference.

C-SAT scores can provide meaningful information, especially when the numeric score fluctuates substantially over reporting periods. But what can be learned from a C-SAT score that remains relatively constant? While some may think a consistently high C-SAT score is a good thing, little useful information can be gleaned from a value that does not change. To get more out of a C-SAT score, other behavioral data must be factored in.

Merging attitudinal survey data and behavioral Web data has many advantages over analyzing either one individually. Attitudinal surveys measure only what respondents self-report. You might assume that people are not only honest but also unbiased in their responses but this is largely not the case. Many outside elements such as time of day, personal problems, financial struggles or even weather can change the way someone might respond to a survey. Therefore, survey data is inherently subjective.

While attitudinal data only captures information about what people say they do, behavioral data focuses on what people actually do. Because of this, behavioral data is always objective and free of bias. The downside is that it offers no insight into why a person might have viewed a certain string of pages, searched for a specific term or watched a number of videos.

Combining both subjective and objective data allows analysts to paint a more comprehensive picture of a visitor's experience as a whole. Be advised that the population from which the sample is drawn must be specifically and carefully defined. The sample reflects only those who answer a survey, so it would be inaccurate to say it represents the entire population of visitors. When measuring engagement, it should

also be noted that visitors who fill out surveys are generally more engaged with the site's content than visitors who do not fill out surveys.

The solution

The purpose of this solution is to: provide a methodology for acquiring, merging, storing and analyzing attitudinal and behavioral data; and enhance insights and bring depth to superficial customer satisfaction measures.

Gather the data

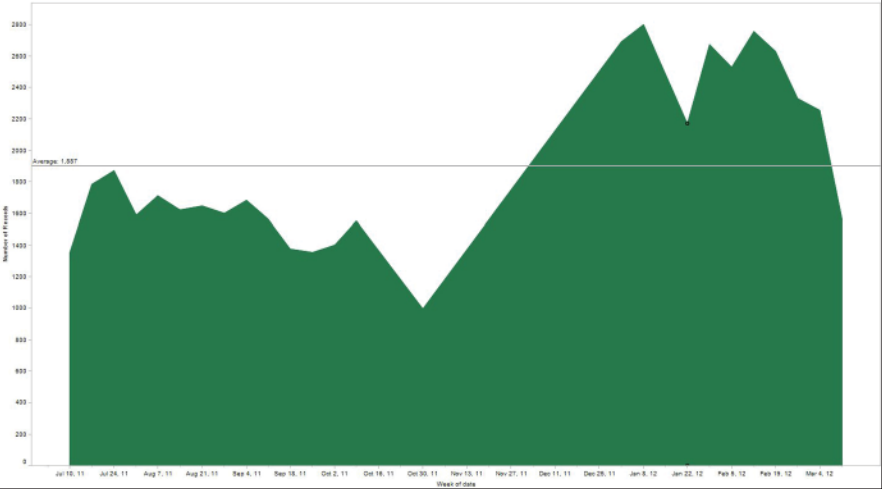
Assuming customer satisfaction data is readily available through the chosen survey interface, the first step is to gather the behavioral data. Web analytics code from a tool such as Google Analytics or SiteCatalyst must be implemented on the site in order to obtain the appropriate metrics. Both tools provide access to the data in their own user interfaces and give several options for exporting the data. Make sure to capture the unique survey identifier as a metric to allow for easy merging with the survey data.

Because response rates to surveys are generally low (3-5 percent), several months or years of data is necessary to ensure a decent sample size for valid analysis. Once the appropriate data has been exported into a usable format, any number of data warehouse programs can be used to merge and store the data. This solution utilizes Microsoft Access. (Other tools used for the analysis tasks explored in this article include Tableau, R, SAS and Minitab.) Merge the data by unique survey identifier and remove duplicates and outliers when appropriate. Load the merged data into a preferred business intelligence analysis tool and begin the analysis.

Outline the assumptions

It is always prudent to outline the assumptions and formulate hypotheses before delving into any analysis. A detailed list of assumptions including time frame, variables included, metric definitions and all calculations helps define the clarity and scope of the project. Statistical tests require a separate set of assumptions and should be listed where appropriate.

Figure 1



Having several testable hypotheses gives the project a purpose and reduces the time spent poking around in the data with no clear direction. That is not to discount aimlessly wandering through the data, because some of my best insights have happened by accident; it is merely a best practice for adhering to traditional research methodology. In general, I spend about 75 percent of the time investigating hypotheses and 25 percent stumbling upon unanticipated findings.

Any number of statistical analyses can be performed on the data, ranging from elementary to advanced; however, high-level testing is rarely appropriate or significant. Traditional and more basic methods including descriptive statistics, linear regression and goodness-of-fit testing are the most useful for discovering deeper insights into the data.

Preliminary analysis should focus on describing the data in its rawest form. Plotting number of records over time can provide a general idea of how responses vary over week, month and year. Are there seasonal trends? Was there a specific event that caused a spike or drop in responses? Matching this data to number of visits to the site will give greater insight into whether a drastic spike in responses is due to a corresponding spike in Web traffic for the same time period.

The area chart in Figure 1 shows number of responses over time by week. There is a sharp decline the week of October 30, 2011 followed by a steep

Figure 2

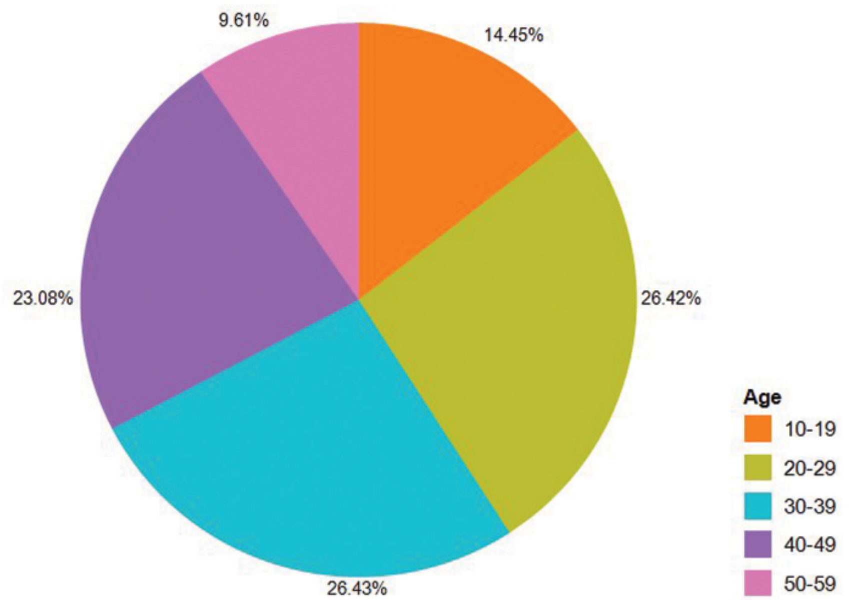
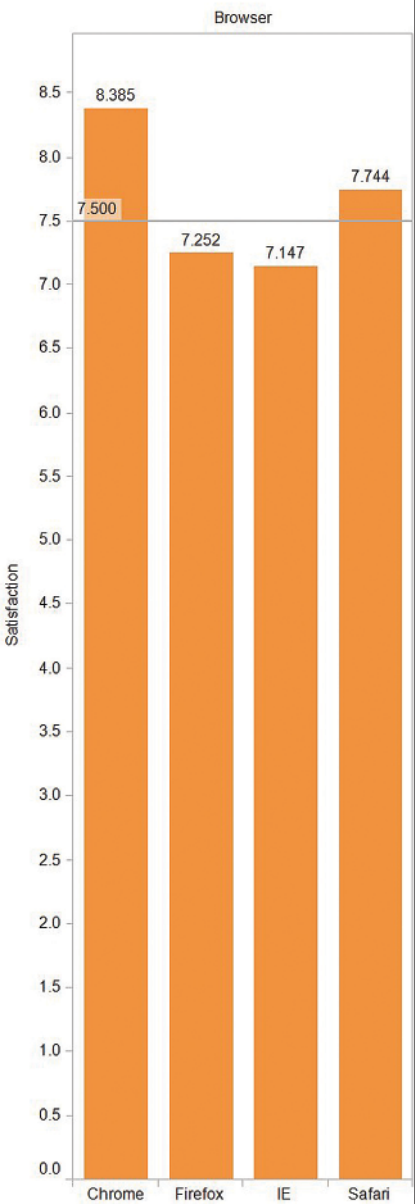


Figure 3



increase through the week of January 8, 2012. The obvious assumption is an increase in traffic due to the holiday season but without syncing this chart to site visits, such a conclusion cannot be soundly validated.

Provide a snapshot

Demographics such as gender, age, marital status, income level and geographic location can be segmented to provide a snapshot of what the sample looks like. What age groups respond most frequently? Is there a region where respondents are more concentrated? Does number of responses differ by gender? While these findings may not prove the most useful, they are necessary to understanding the sample.

The pie chart in Figure 2 shows percent of respondents segmented by age group. It is helpful to see if one slice is considerably smaller than the other slices in the chart because its contribution to the data will not be as significant as a larger slice and should be noted as such.

Preliminary analysis should also establish some sort of benchmark or average value to which segmented data can be compared. Depending on the purpose of the analysis, this number can be anything from a measure of satisfaction, number of page views or even revenue. Using this average as a baseline for comparison will reveal any significant differences among the data that might not have been noticeable on their own.

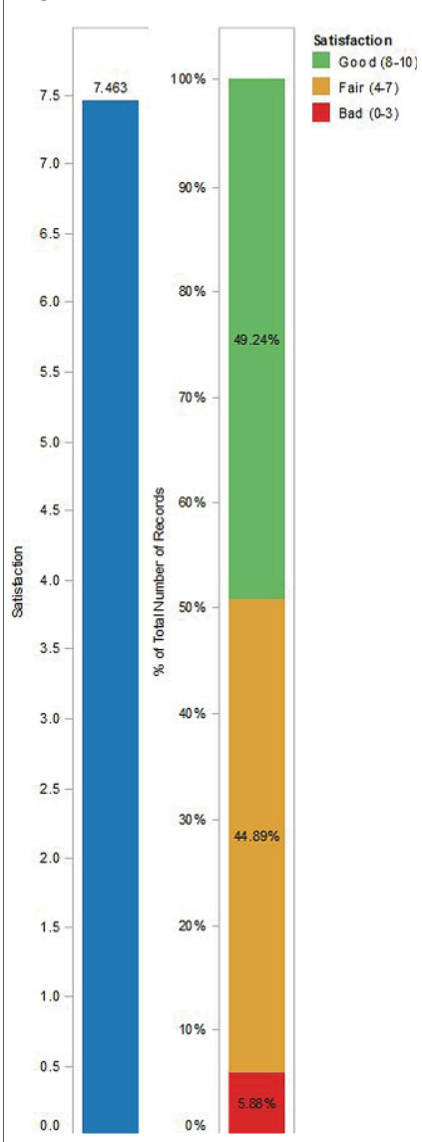
In the bar chart in Figure 3, the reference line represents average customer satisfaction for the time period analyzed. Plotting this average on the chart reveals whether satisfaction differs when segmented by browser. It is clear that those using Chrome report higher average satisfaction than those using Internet Explorer but without the reference line one would not know how these compare to the overall average.

Statistical testing for significant differences between average satisfaction can be carried out from this point; however, it may be difficult to find statistical significance among the data when the sample size is considerably large and the range of values tends to linger around the same number. ANOVA testing for a difference between multiple means, the appropriate test, will rarely generate significant results and should be avoided.

Average satisfaction can be represented either by overall average or by "box" rating. Visually, overall average is simply a bar with height corresponding to the specific number. Average by "box" shows the distribution of responses as percentage of the total number of records. Depending on how the possible responses are defined, there are can generally be anywhere from two (0 or 1) to 11 boxes (0-10).

The bar chart in Figure 4 shows both representations of satisfaction, with average on the left and percentage of total by box on the right. Each tells a different part of the story. The raw number represents satisfaction, while percentage of total by box shows a more detailed breakdown of the responses that contribute to the raw number. In this case, values from 0-10 were grouped into three categories for simplicity. The groups can certainly be expanded or condensed for more or less granularity. Keep in mind the audience to whom the data is being presented; those with an advanced background in analytics are more inclined to favor detailed graphs with multiple axes and several charts per pane, while less-analytical clients may prefer simpler visuals with clearer guidance.

Figure 4



Analysis by box is useful for examining the top-two and bottom-two boxes of customer satisfaction. In general, there are three main box classifications:

- Top-two – responses including "good," "very good," "above average," "outstanding" (green)
- Bottom-two – responses such as "very bad," "bad," "below average" (red)
- Middle – anything along the lines of "fair," "okay," or "average" (yellow)

Ideally, companies want to decrease the number of responses in the bottom-two boxes, while simultaneously increasing the number of responses in the top-two boxes. This would result in a higher overall satisfaction raw number. Usually, this happens slowly over time with dynamic improvements to the customer experience.

Depending on the nature of the data and the goal of the client, analysis can include other statistical testing such as chi-square goodness of fit, linear regression and factor analysis.

Allows further exploration

In order to deliver a multidimensional analysis, reports of customer satisfaction must include behavioral metrics gathered outside of the survey. Merging attitudinal and behavioral data allows further exploration of C-SAT data beyond the obvious conclusions.

Clients will be able to use the resulting analysis to: improve the user Web site experience by identifying easy fixes and long-term changes that must be made; optimize site usage by removing underutilized tools, combining similar site sections and streamlining content; raise overall conversions by focusing users on completing essential goals like purchasing, signing up for newsletters or taking advantage of deals and offers.

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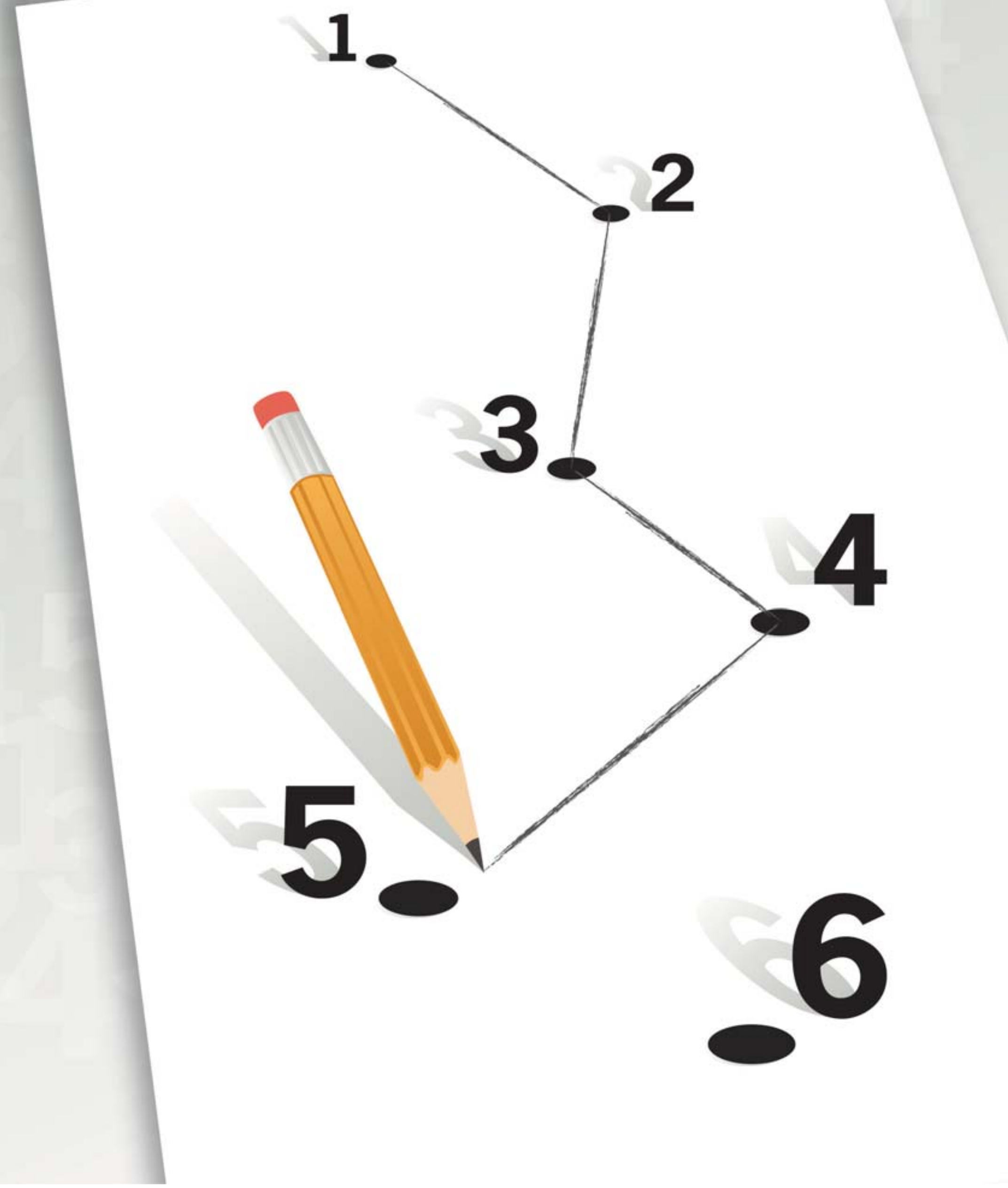

case study

snapshot

Online research with members of its core audiences introduced the Crohn's and Colitis Foundation of Canada to the power of qualitative insights.

••• health care research

Redefining the message

Online qual guides health care foundation to shift its focus

| By Kelly Hancock

For years, the Crohn's and Colitis Foundation of Canada (CCFC) focused on finding a cure. Education about the diseases and support for people who suffer from them fell into the mix but were overshadowed by fundraising efforts to help fund research. However, with a growing number of patient requests for information and support, the foundation took a broader look at its mission and wanted to identify the biggest patient needs and opportunities for the association to make a difference. The CCFC turned to qualitative researcher Layla Shea, a member of the Qualitative Research Consultants Association (QRCA) and founder of Upwords Marketing Solutions, a Victoria, B.C., research firm, to help identify and understand the greater needs of the patients the foundation serves.

Shea's study, which won a QRCA Qually Award earlier this year, offered insights that changed the way the organization prioritizes activities and outreach. It helped further the development of the CCFC's efforts in finding a cure, raising awareness and educating patients, families and health care professionals about Crohn's and colitis.

quirks.com/articles • ID 20121006

Make it easy

Shea's approach needed to make it easy for Crohn's and Colitis patients to participate. She chose an online method for two key reasons:

Sensitivity to patient needs. Some Crohn's and colitis patients find it difficult to be away from home for even a few hours because of the nature of their diseases. Shea also wanted to remove the social pressures that come with discussing such a personal topic in a face-to-face setting.

Geographic reach. The CCFC serves a large geographic area. Conducting online research afforded opportunities to hear from respondents across all of Canada in a single study.

The 10-day study included two activities each day – one poll and one engagement activity. The daily poll question asked, "Was today a good day or a bad day and why?" Shea's activity-based conversations stimulated more discussion and personal interaction than a standard set of questions. "I took a very personalized approach to communicating with study participants," Shea says. "I made contact with each respondent individually prior to the study, so they knew a little about me. This allowed the participants to feel more comfortable about sharing and communicating with the group. Respondents sometimes forgot they were taking part in research and just opened up. They began organically talking to each other almost immediately."

The interaction between respondents throughout the course of the research revealed the wide range of emotions that patients experience. Shea was able to capture many of the frustrations, concerns, inspirations and encouragements that Crohn's and colitis patients encounter. These insights stemmed from the high level of engagement in each day's activities, which were designed to understand the everyday life of a patient. Activities were meant to allow participants to relate to each other, share ideas and offer support.

For example, the "Let's Vent" activity called for respondents to post about the things that frustrated them. They were encouraged to write about things that irritate them or post photos or videos that described how they felt. This activity sparked a lively conversation among respondents, who instantly began building on each others' posts and stories.

Another activity, "Show and Tell," encouraged respondents to take pictures and videos of their refrigerators, medicine cabinets, etc., share them with the other participants and explain how certain items help in coping with their disease. This gave Shea valuable insights about the less obvious symptoms and unconventional yet effective ways to handle them.

A more strategic approach

With the CCFC's desire to take a more strategic approach to patient communications, the research findings needed to help the foundation understand what patients go through in their search for information. Shea helped identify three specific stages of Crohn's and colitis diagnoses and the needs associated with those stages:

1. **Pre-diagnosis** – *"What is wrong with me?"*
   The information needed while symptoms occur before a diagnosis is made.
2. **At diagnosis** – *"Help me understand."*
   The desire for more information about how a patient's life will be affected and what he/she needs to do to manage the disease.
3. **Post-diagnosis** – *"Help me take control."*
   How can a patient create a meaningful life while managing this disease?

The CCFC created three specific communication strategies, tailoring tactics and messaging to the distinct needs and feelings of patients in each stage.

Pre-diagnosis

From the perspective of someone who has symptoms of Crohn's disease or colitis but has not yet been diagnosed, the CCFC serves as a resource for understanding what specific symptoms mean and how they should be dealt with. People who suspect they have Crohn's disease or colitis can find Webinars, Q&A forms, hyperlinks to directories of nearby medical professionals and supportive online communities and more as they browse the CCFC Web site. The CCFC also utilizes social media platforms and hosts live educational conferences to provide information to patients who are undiagnosed and seeking understanding.

At diagnosis

The research highlighted the increasing importance of the CCFC's role during a patient's diagnosis meeting. Many respondents said they still had a lot of questions when they left diagnosis meetings with their health care professionals. Shea's follow-up with medical professionals revealed that they wanted, of course, to better serve patients, but they didn't have access to materials that provided answers to key patient questions. Shea indicated that one nurse practitioner went as far as to put together her own information booklet to give to new patients. "Many of the medical professionals we reached out to were excited to learn that this information exists and is already put together for them to provide to patients," Shea says.

The CCFC was glad to be able to connect the dots. "We refined our strategy to say, 'This is what patients are looking for. Here's what doctors are looking for to help patients. Here's where we can play a role in that interaction between physicians and patients,'" says John Branton, chief development officer for the CCFC.

The foundation reworked its brochures and provided them to medical professionals so patients could see that the CCFC is a resourceful provider of information and support from the very beginning.

Post-diagnosis

The CCFC learned that it's important to show patients how to better utilize technology, as the research exemplified ways to find Crohn's and colitis support groups online. In addition, qualitative insights found that patients wanted tools and information to share with employers and schools to explain what their disease is like. Patients also wanted more awareness among the general public, so others know what they're going through.

Realign its materials

The CCFC used the findings to realign its communication and education materials with the needs of both patients and health care professionals. "The research validated some of our key strategies and helped us refine how we positioned some of the topics," says Branton. "It helped identify new areas that we didn't even know about, which resulted in many new tools for patients. We were able to see what we should stop doing, what we should start doing and what we should refine or keep doing."

Branton attributes the development of the CCFC's patient-centered business model to the findings of the study. "We didn't know much about qualitative research or what it could do for us," says Branton. "We gave it a chance and Shea's research ended up being invaluable to us. From validating key brochures to creating new online resources for our patients, the insights are even helping us devise our strategic five-year business plan right now."

Branton and Shea agreed that their most important qualitative insights led to a three-pronged approach for patients to deal with their disease. The research manifested patients' needs for information, empowerment and support. "The CCFC's sole focus was on funding research to find a cure for Crohn's and colitis. Thanks to insights from Shea's study, we have become much more dynamic and grown as a foundation with a greater purpose," says Branton. "The research study findings are prompting us take a more active role in educational outreach and other support mechanisms for patients."

Upward trend

The organization's efforts appear to be working. Branton says there has been an upward trend in the number of inquiries for information since the new communications were implemented. There also has been a significant increase in the number of people attending CCFC conferences and educational events. And the foundation has seen an increase in attendance and donations at its fundraising events.

So the research clearly helped the CCFC. But more important, it is helping Crohn's and colitis patients meet their own individual needs and also enjoy the satisfaction of easing the lives of others whose situations are similar to their own. Throughout the research process, participants showed a sincere interest in supporting each other and helping the CCFC advance its communication efforts, Shea says. "They didn't want others to go through what they had gone through and they knew they could make a difference. Their support for each other translated into having a positive impact on the entire study and, therefore, developing resources for others."

Kelly Hancock handles communications for the Qualitative Research Consultants Association. Visit www.qrca.org for more information.

case study

••• sports and leisure research

Driving improvements

Study results guide enhancements to Myrtle Beach Golf PassPort

| By Michael Latta, Mark Mitchell, Charles Thrash and Albert J. Taylor

snapshot

Research helped make an already successful affinity marketing program for golfers in Myrtle Beach, S.C., even more so by delivering greater choice and value.

quirks.com/articles • ID 20121007

Since the opening of America's first golf course in Charleston in 1786, golf has played a significant role in the economy of South Carolina. A study by the South Carolina Department of Parks, Recreation and Tourism shows the economic activity from visiting golfers on and off golf courses in South Carolina created a $2.72 billion economic impact in 2007, with the Myrtle Beach area creating more than half of that impact.

In the tourism industry, golf creates more income than any single entertainment or other activity in South Carolina. In addition, it has been estimated that golf generates nearly 39 percent of the state's tax revenues according to the South Carolina Department of Parks, Recreation and Tourism. Therefore, the effects of the estimated 785,000 trips to South Carolina including a round of golf are an important issue for the state, Horry County and Myrtle Beach itself.

The unique importance of golf and tourism to the area created an opportunity to study how a local affinity marketing program, Myrtle Beach Golf PassPort, impacts the large number of visitors to the area as well as those golfers who live in Myrtle Beach.

The program's Web site (www.myrtlebeachgolfpassport.com) is sponsored by the Myrtle Beach Area Golf Course Owners Association (MBAGCOA) and offers two types of memberships: 1) local resident memberships, which are valid January through December; and 2) winter memberships, which are available to anyone and are valid only December of the current year through February of the next year.

The MBAGCOA first offered the Myrtle Beach Golf Passport in 1993, enabling eligible residents, as well as those who own second homes in Myrtle Beach and surrounding areas stretching from Charleston, S.C., to Wilmington, N.C., the opportunity to enjoy reduced golf fees all year round. This program has been favorably received by over 10,000 members and has enjoyed a 75 percent annual renewal.

Build on that success

Looking to build on that success, a marketing research study was undertaken to determine if PassPort should be expanded from simply reducing greens fees to include other areas of golf vacation activities such as attractions, restaurant types and retail shopping locations.

The MBAGCOA agreed to cooperate in the marketing research effort and helped to generate lists of attractions, restaurants and retail shopping locations that might become part of the PassPort affinity marketing program, as detailed below.

Attractions

The 10 attractions cover events for adults and children and represent the main attractions in the Myrtle Beach area: Alabama Theatre, Carolina Opry, casino boat gambling, Comedy Cabana, Dixie Stampede, House of Blues, Legends in Concert, Medieval Times, Myrtle Waves and Ripley's Aquarium.

Restaurant types

The seven restaurant types are varied in cost, social status and themes. Some are in natural groups because of ownership and they represent a cross-section of restaurants available in the Myrtle Beach area:

Theme restaurants (Planet Hollywood, Hard Rock Cafe, etc.)
Italian restaurants (Olive Garden, Carrabba's, etc.)
Steakhouse restaurants (Outback, Ruth's Chris, Logan's, etc.)
Seafood restaurants (Joe's Crab Shack, Blue Crab, Divine Fish House, etc.)
Sandwich shops (Jersey Mike's, Firehouse Subs, Quizno's, etc.)
Sports bars (Handley's, Overtime, Spencer'z, Beef 'O'Brady's, etc.)
Mexican restaurants (El Patio, El Cerro Grande, Burro Loco, etc.)

Retail shopping locations

The 10 retail shopping locations represent both golf specialty retail outlets and general merchandise retail locations: Barefoot Landing, Broadway at the Beach, Coastal Grand Mall, Colonial Mall, Golf Dimensions Superstore, Inlet Square Mall, MacFrugal's Golf (Murrells Inlet), Martin's PGA Tour Superstore, Old Golf Shop (North Myrtle Beach), Tanger Outlets.

The survey questionnaire was distributed by the Myrtle Beach Golf Owners' Association using its e-mail facility and the PassPort membership list. In addition to a variety of demographic items, the survey participants were asked if they were an occasional visitor, seasonal visitor, part-time resident or full-time resident in the Myrtle Beach area. The participants were then grouped into visitor and resident segments. For each of the attractions, restaurant types and retail shopping locations, the participants indicated whether or not they never, rarely, sometimes or always visited each of the attractions, restaurant types and retail shopping locations.

The survey yielded responses from 529 residents, and 199 visitors for a total sample size of 728. These data were then analyzed for differences between the visitor and resident segments.

Low level of willingness

Overall, the attractions showed fewer participants willing to always visit them, ranging from 1.2 percent for Myrtle Waves to 8.5 percent for Carolina Opry. This low level of willingness to visit is in contrast to the restaurants, which showed a low of 2.3 percent for theme restaurants and a high of 33.7 percent for steakhouses as well as a low of 1 percent for Old Golf Shop and a high of 57.2 percent for Martin's PGA Superstore in the retail shopping locations category.

Significant differences were found between residents and visitors in their willingness to always visit locations on the Grand Strand and Myrtle Beach. These results for attractions are summarized below.

Attractions

Significant chi squares were found for the six attractions listed below along with their p values: Alabama Theater ($p < .0001$), Carolina Opry ($p < .0001$), Dixie Stampede ($p < .002$), Legends in Concert ($p < .0001$), Medieval Times ($p < .0001$) and Ripley's Aquarium ($p < .003$).

In all cases, residents were significantly more willing to visit these attractions compared to visitors. However, the percentages of PassPort members who always or sometimes visit any of the attractions was low, averaging only 19.8 percent and ranging from a low of 10.7 percent to 39.0 percent. The unwillingness of the majority of visitor PassPort members to visit attractions sometimes or always makes attractions a low priority for inclusion in a discount program for PassPort members who are visitors. The results for residents weren't much better, showing an average of 26.1 percent and ranging from a low of 9.9 percent to 43.9 percent of residents who are sometimes or always visiting attractions.

Restaurant types

Significant chi squares were found for two restaurant types (listed along with their p values): Italian restaurants ($p < .002$) and seafood restaurants ($p < .008$).

A majority of visitors who are PassPort members either sometimes or always visit restaurants in high percentages for the following: steakhouses (79.2), seafood (77.8 percent), Italian (68.0 percent) and sports bars (51.1 percent).

Though residents and visitors showed no significant difference for steakhouses, the combined percentage for all PassPort members who say they either sometimes or always visit steakhouse restaurants was 83.6 percent, the highest for restaurants as a group. In addition, Italian restaurants had an all-PassPort member percentage of 76.3 percent and seafood restaurants had a combined percentage of 77.8 percent, followed by sports bars at 53.0 percent who either sometimes or always visit these restaurants. These three categories of restaurants are good candidates for inclusion in a discount program for all PassPort members.

Retail shopping locations

Significant chi squares were found for the five retail shopping locations listed here along with their p values: Coastal Grand Mall ($p < .0001$), Colonial Mall ($p < .04$), Golf Dimensions Superstore ($p < .044$), Inlet Square Mall ($p < .0001$) and MacFrugal's Golf (Murrells Inlet) ($p < .034$).

A majority of visitors who are PassPort members either sometimes or always visit retail shopping locations in high percentages for the following: Martin's PGA Superstore (89.7 percent), Golf Dimensions Superstore (78.8 percent), Broadway at the Beach (77.2 percent), Tanger Outlets (70.5 percent), Barefoot Landing (64.2 percent) and Coastal Grand Mall (55.7 percent).

The most frequently visited retail shopping locations are either golf specialty stores or diversified retail centers.

Recommendations were made

The study results were presented by the research team to the Myrtle Beach Area Golf Course Owners Association at a golf owners' conference. The following recommendations were made.

- The opportunities for offering discounts in the PassPort program are, in descending order of potential value: shopping, restaurants and attractions.
- Since a majority of PassPort owners who were either residents or visitors did not indicate they either sometimes or always go to any of the attractions, this category was not recommended by the research team for discount offers. The lack of a broad appeal indicates no interest.
- Discounts for steakhouses and seafood restaurants were highly recommended by the research team for both visitor and resident PassPort members. This recommendation was based on high percentages of both segments saying they would either sometimes or al-

ways visit a steakhouse or seafood restaurant. These discounts were offered through PassPort at the following restaurants: Aspen Grille (25 percent), Blue Crab (25 percent), Bovine's Steak House (25 percent), Collectors Cafe (25 percent), Divine Fish House (25 percent), Divine Prime (25 percent), Ruth's Chris (25 percent), T-Bones Steak House (25 percent), Parson's Table (25 percent) and Thoroughbreds Restaurant (25 percent).

- Discounts at retail shopping outlets were also recommended by the research team, but were confined to golf shops. Merchandise discounts were made available through PassPort for members and guests at most pro shops (10 percent), Golf Dimensions (10 percent) and Callaway Performance Center (10 percent). The size of the discounts and the specific offers for restaurants and retail golf shops were a function of the other discounts available through Web offers like CouponCrab.com and GolfHoliday.com as well as the willingness of the restaurants and retail outlets to add PassPort to their accepted discounts. The recommended goal was to have discounts as unique to PassPort as possible and to have them as large as possible. Since Pro Shops, Golf Dimensions and the Callaway Performance Center operate on a small margin, their discounts were less than restaurants.

Utilization has been high

All of these special discounts have been made available and marketed on the enhanced owners' Web site, myrtlebeachgolfpassport.com. Utilization has been high on the 81 courses represented on the Web site and the program may be expanded to include more restaurants and golf retail outlets if partners can be found.

Any affinity marketing program that increases the likelihood of golf vacations in Myrtle Beach and matches the desires of golfers to eat at restaurants and shop in golf shops is a benefit to everyone. The economic benefit to the state and local community by visitors holding PassPort cards exceeds the cost of the affinity marketing program. The South Carolina Golf Course Owners Association estimates $1 billion was spent off-course by visitors who played golf on one or more of the 79 golf courses in Myrtle Beach. That off-course spending is evidence of the significant impact of improvements in the PassPort affinity marketing program and the marketing research that supports development of new discounts benefiting both visiting and resident golfers.

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Food for thought

A look at the gluten-free movement and how food companies have responded to it

| By Eileen Acello

snapshot

More than just a fad, the author argues, living gluten-free is a necessity for celiac disease sufferers. As a result, these consumers offer the food makers who meet their needs the chance to earn a lifetime of trust and loyalty

Nearly 21 million people have celiac disease or some form of sensitivity to gluten, a protein found in all foods and products containing wheat, barley and rye, according to National Foundation for Celiac Awareness (NFCA).

This is not a completely new condition; Americans first started being diagnosed with it as early as the 1940s. Celiac disease is a genetic or autoimmune disorder where the immune system attacks the tissue of the body, according to CeliacCentral.org. It is triggered by consuming gluten, which interferes with the absorption of nutrients from food by damaging a part of the small intestine called villi. When nutrients do not get absorbed into our bloodstream it can lead to a host of problems including malnourishment, cancer, osteoporosis, Type 1 diabetes, infertility and the onset of other autoimmune diseases.

Celiac disease can be triggered by stressful physical and/or emotional events in a person's life such as surgery, childbirth or divorce. There are nearly 300

symptoms associated with it, although the most common are gastrointestinal – such as abdominal pain, bloating, constipation, gas – and non-intestinal, such as anemia, itchy skin rash, migraine headaches and bone/joint pain, to name a few.

Other groups of people affected by gluten include parents of children with autism spectrum disorder or with ADHD, patients suffering from gastrointestinal disorders like irritable bowel syndrome and Crohn's disease, individuals following an anti-inflammatory diet and still others who simply perceive that gluten-free food is somehow healthier.

Seeing green

With so many sufferers searching for relief, the gluten-free diet has quickly become one of the fastest-growing nutritional movements in America, according to the NFCA. As a result, gluten-free is top-of-mind for many food retailers. Some are seeing green, envisioning the dollars they can make from what some might call a fad. Others are less excited, viewing the gluten-free movement as reminiscent of other crazes that have come and gone such as the Atkins Diet.

Time will tell about its longevity but thus far the gluten-free category has defied the recession by continuing to grow with a compound annual growth rate of 30 percent from 2006-2010 according to Rockville, Md., researcher Packaged Facts, which expects the gluten-free market to exceed $5 billion by 2015.

Welcome friend

For many consumers, gluten-free foods are a welcome friend. Progressive retailers are already seeing results with their gluten-free programs. Three years in the making, Safeway recently instituted a program called SimpleNutrition after surveying its customers who wanted to make more informed food choices. It uses green tags throughout the store highlighting up to two key nutrient and ingredient benefits such as organic, low sodium or gluten-free.

Other retailers like Whole Foods only work with vendors who are certified gluten-free by one of the independent third-party agencies or allergen control programs which use a 20 parts per million (ppm) threshold, which is the standard proposed by the FDA. Whole Foods offers gluten-free shopping lists for customers with these special dietary needs.

Wegmans is another supermarket that is ahead of the curve with regard to offering consumers with dietary restrictions a place to go and find variety and guidance in their choices. Wegmans has dedicated aisles for gluten-free under its Nature's Market Place department and a Wellness Key Program throughout the store indicating, with a brightly colored dot, whether a product is gluten-free, lactose-free, fat-free, etc. (Only the Wegmans store brands are bedecked with these symbols so look for the orange dot with a G in the middle of it when you want gluten-free.)

Wegmans is taking proactive steps with six registered dieticians on staff, a Fresh News e-newsletter that is distributed weekly with new products, recipes and nutritional education, an educational video on the gluten-free Web page and it offers lists of products and recipes that are gluten-free in its stores. Wegmans Fresh Stories blog offers helpful hints on products and its dieticians respond to consumer questions about gluten-free issues.

On a smaller scale, Laure Stasik, a registered nurse and dietician, is the owner of Alternative Eating, a thriving specialty food store in Scranton, Pa., specifically targeted for people who need gluten-free foods. Stasik knows a lot about this subject because she has celiac disease and could not find the products she wanted so she went into business for herself and others with this dietary restriction. Her customers travel far and wide to stock up in her store. "I get satisfaction out of watching my customers' health improve when they begin to follow the gluten-free diet. It's priceless," she says.

With a variety of retailers dedicating shelf space to this market, researchers from Packaged Facts expect to see a much wider range of gluten-free products on shelves by 2012, a process driven in large part by companies reformulating existing products for gluten-free acceptability.

Emotional attachment

Many national food companies have realized that gluten-free is not a fad but rather a lifestyle. Those who have been diagnosed with celiac and gluten sensitivity are hungry for foods that they ate in their youth. There is an emotional attachment and brand loyalty to foods enjoyed as children. Consumers are not necessarily looking for new brands but rather want to continue eating brands they know and grew up with. Some of the more progressive companies are recapturing this brand-loyal customer that they have invested in for decades.

Brands such as Kellogg's, General Mills, Frito Lay and Snyder's of Hanover are capitalizing on this market by reformulating or relabeling in some cases their existing brands. Kellogg's Gluten Free Rice Krispies cereal is made with whole-grain brown rice and eliminates barley malt (the source of gluten in the original Rice Krispies cereal). The gluten-free option is produced in a separate facility and each batch is tested to ensure its gluten-free status. Gluten Free Rice Krispies cereal is in the cereal aisle, right alongside the original Rice Krispies cereal and at the same price.

Betty Crocker was the first national brand to launch gluten-free brownie, cookie and cake mixes in traditional grocery stores. This innovative line of products satisfied gluten-free consumers' previously unmet desire to find great tasting, affordable and easy-to-prepare desserts.

Frito-Lay on the other hand has simply relabeled several of its products as gluten-free starting in 2011. "Since many of our chips are made from simple ingredients like corn or potatoes, they have naturally always been made without gluten. However, consumers with celiac disease have told us it is more helpful when they shop to have the words 'gluten-free' included on the packaging. So to help meet their needs, Frito-Lay is now validating with analytical testing that these products contain less than 20 parts per million (ppm) of gluten then adding the 'gluten-free' claim to our bags," according to FritoLay.com.

Snyder's of Hanover has been working with the Gluten Free Certification Organization (GFCO), a program of the Gluten Intolerance Group (GIG), since September 2009 and has announced that its Gluten-Free Pretzel Sticks are GFCO-certified.

Other crossover brands that have capitalized on this audience include: Anheuser-Busch's gluten-free Redbridge beer, General Mills Chex cereals and Bisquick, Post's Fruity Pebbles, Boar's Head and Dietz & Watson. Even the Girl Scouts of America is cashing in on this opportunity with its new Blueberry Pomegranate Nut Crunch.

Follow some basic rules

National brand food companies who want to reformulate their products to become gluten-free must follow some basic rules. Getting certified is key. A new science-based gluten-free certification program is now available from organic certifier Quality Assurance International (QAI) and the NFCA.

QAI, with its parent company NSF International, an independent public health and safety organization, brings more than 66 years of food safety auditing and certification, and 20 years of organic certification experience, to this new consumer label. NFCA is dedicated to achieving greater accessibility of gluten-free foods and health and food safety solutions for celiac and gluten-intolerant consumers.

The certification program requires: sensitive testing procedures; stringent auditing; an independent application review process; the use of feedback from consumers, manufacturers and retailers; a product review; onsite inspection; testing to ensure compliance to 10 ppm or less; and random product testing.

Consumers rely on labels

A survey by Anne Lee at the Celiac Disease Center of Columbia University found that consumers rely on gluten-free labels to identify products. Consumers are more likely to purchase products with the label on the front of the package compared to the back. When consumers were presented with two products with identical ingredients they purchased the product labeled gluten-free.

To alter an existing product, companies can use rice, corn, soy, potato, buckwheat, quinoa, millet or nut flours, according to the American Dietetic Association. However, changing the grains can make the products texture and overall taste change significantly.

Many manufacturers question the economic feasibility of going gluten-free, citing barriers such as the time required to source ingredients and obtain appropriate equipment. But there are options, such as outsourcing by utilizing co-packers with dedicated gluten-free rooms and equipment or gluten-free manufacturing facilities. Another investment is employee training and education. Using testing from an independent lab will also align a company with the new FDA labeling rules.

Food companies developing products for this market need to consider the FDA's labeling restrictions. The FDA document should include a definition of gluten-free, synonyms that may be used for gluten-free label claims and an overall threshold value of gluten parts per million (ppm) that can be in a food and still be billed as gluten-free.

Gluten-free certification benefits the manufacturers because it gives them the credibility, recognition and support that they have provided a gluten-free product. The inspections given by the GFCO will also verify that the company is providing high standards in producing their product, with minimum cross-contamination. The manufacturers will also save time and resources that would have been spent answering questions regarding the gluten-free status of their products.

Michael Dernoga and Ridgely (Rid) Francisco, owners of Lizbeth Lane Gourmet Cuisine Simmer Sauces, have recently received certification on their all-natural gluten-free simmer sauces. "This certification allows us to be proactive with our customers and I am happy to say that our sauces fall far under the 20 ppm threshold," Dernoga says.

Lizbeth Lane Gourmet Cuisine saw an advantage in the marketplace when it created its sauces, which just so happened to be gluten-free. "We have a second marketing position with our sauces – we are also all-natural – that we did not foresee when creating them," says Francisco. "We soon realized that [gluten-free] is a huge, growing market. There is still a curse associated with gluten-free food – many people think of them as dull and flavorless but that is what gives us the edge with our sauces because our flavor is not compromised a bit."

The comfort this certification offers the consumer is invaluable to the safety of their health. "Eating gluten-free food is not a choice, it's a life sentence," says Jennifer Brockson, a registered nurse and celiac patient. "So to be able to confidently choose foods that I know are safe because they come from a certified manufacturer is a huge relief."

Sequestering product, testing, taste and texture challenges are among the many factors that interested companies must consider before entering the gluten-free category. "Food companies have undergone an education about what it takes to produce gluten-free food items," says Elizabeth Arndt, director of R&D for ConAgra.

Market research analysts agree the gluten-free category continues to garner interest from food manufacturers, retailers and consumers. But there is debate about whether interest and demand are sustainable enough to be worth the time and resources food companies will potentially spend working through the challenges posed by gluten-free food manufacturing.

One prediction on the future of the gluten-free phenomenon is that the dabblers will drop out of the lifestyle but companies will continue to make innovations in gluten-free food manufacturing and improve product quality to generate crossover appeal. "I don't think it's a fad at all," Arndt says. "There is a core of consumers who need these products. The growing selection of gluten-free foods is not like the low-carb craze was. The trend is helping to raise the bar on product quality and nutrition for consumers with celiac disease and other gluten sensitivities and it will be a healthier category overall."

Into the limelight

Many celebrities have helped bring gluten–free into the limelight, though this attention is not always welcome, especially when it comes to misinformation about "going gluten-free." The media is calling the movement a fad or craze while neglecting to properly cover the medical necessity of the gluten-free diet for some and underestimating the discipline it takes to stay on this diet. For many, gluten-free is just a lifestyle choice but what the fad followers soon find out is that the diet is expensive and limiting to say the least. "While the dabblers get to drop out without a problem, those with celiac risk their health and well being if they drop out," says Brockson.

If a product is gluten-free it doesn't mean it's automatically healthy, says Pam Cureton, registered dietitian for the University of Maryland Center for Celiac Research. In fact, gluten-free products actually have a few dietary disadvantages. For one, unlike regular grain foods like bread and rice, gluten-free versions are not required to be enriched with B vitamins and iron (which is why people going gluten-free should also take a multivitamin). You also have to work harder to get enough fiber on a gluten-free diet, since many products are made with fiber-poor rice flour.

The only true prevention

Although researchers are working to develop prevention therapy for celiac disease and gluten sensitivities, the only true prevention is a gluten-free diet. However, innovative food companies and progressive retailers are recognizing this need by reformulating existing product lines, making label changes and creating space on the shelf. Manufacturers and retailers who do not recognize and respond to this need may lose out on a potentially profitable lifetime customer.

The marketing opportunity is ripe and should not be overlooked. Gluten-free is here to stay and now it's just about taking the steps to provide consumers on gluten-free diets with delicious food that they know and love in a convenient setting. If you build it, they will come … back!

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The unknown.

●●● health care research

Less medicalese, please

Ethnography reveals top four physician-patient conversational gaps

| By Kevin Fulmer

snapshot

The author outlines common gaps that exist when doctors interact with their patients and explores how understanding these disconnects can improve the health care process for both parties.

Each year, over one billion conversations occur between health care providers and patients within the United States. If the collective goals of the health care industry are to enhance care, reduce cost and improve patient outcomes, we must go beyond researching patients and health care providers in isolation and acquire a deep understanding of the dynamics, challenges and opportunities that exist within the exam-room dialogues between physician and patients.

The in-office conversation between a physician and patient plays a critical role in establishing good clinical relationships, relationships that serve as the building blocks for improved medication adherence and patient satisfaction. However, more often than not, we hear about the dramatic inefficiencies of the doctor-patient encounter. For example, studies have shown that patients can forget up to 80 percent of their discussion with health care providers, and of what patients do remember, approximately half is recalled incorrectly (Kessels [2003] *Journal of the Royal Society of Medicine* 96:219-222). Fortunately, a relatively new technology-delivered ethnographic research methodology gives researchers a fly-on-the-wall perspective to the natural conversations that occur between physician and patients. This linguistics-based ethnographic approach reveals the conversational gaps that exist within the exam-room dialogue and begins to unravel their roots, allowing the health care industry to bring forward solutions that support and improve the physician-patient conversation and ultimately improve patient outcomes.

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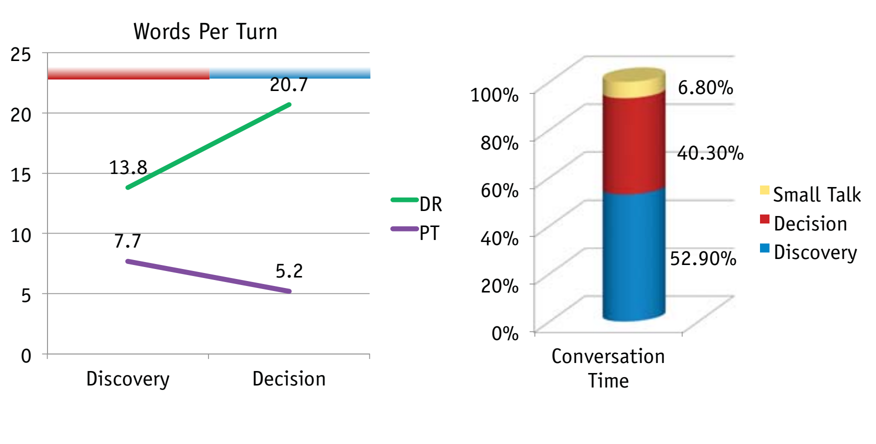
Figure 1: The In-Office Interactivity Gap



Sample: 480 hand-tagged conversations in dyslipidemia, hypercholesterolemia and Type 2 diabetes

Via technology, a relatively large sample of in-office dialogues can be amassed quickly, developing a database (or corpus) of interactions for research purposes. This large collection of global exam-room dialogues allows researchers to examine a sample larger than what was previously feasible, leading to more concrete findings from the research.

Causes of disparity

A high-level inspection of exam-room dialogues begins to shed some light on the possible causes of disparity within the exam room. Predictably, physicians tend to dominate the conversation, leaving patients with fewer words per "turn" as the discussion moves from discovery, the phase for exchange of information relating specifically to symptoms and disease experience, to decision, the phase of conversation focused on treatment selection (Figure 1).

But wordy doctors are not the only issue at hand here. All patients walk into the doctor's office with pre-existing and widely varying knowledge, attitudes, fears and beliefs about their condition which affect a their ability to comprehend new information provided by their health care provider, as well as their willingness to adhere to new treatment instructions. So to truly understand and improve the physician-patient conversation, researchers must go deeper, looking beyond just what was said and how often it was said and examine the linguistic characteristics of the conversation to determine how and why it was said. Through the analysis of large samples of exam-room conversations, trained medical linguists are able to mine the complex spoken language for these underlying patient emotions, identifying conversational gaps and revealing the drivers and barriers of effective communication.

Four conversational gaps

Upon examining thousands of in-office interactions across hundreds of different disease states, four primary conversational gaps between physicians and patients surface:

Gap No. 1: Misaligned treatment conceptualization
Gap No. 2: Dissimilar conversational goals
Gap No. 3: Language disparity
Gap No. 4: Unbalanced decision-making

Misaligned treatment conceptualization

From their candid conversations it becomes apparent that physicians' conceptualization of disease and treatment differs widely from the way patients view their condition. This gap leads to a misalignment of physician and patient treatment goals, impacting patient acceptance and buy-in to taking medications and modifying their lifestyle.

Physicians generally have a management philosophy in treatment of disease, while patients have a curative approach to treatment. In addition, patients talk about their disease and symptomatology in terms of daily impact (past or present), while physicians focus on a clinical assessment with a future-looking orientation.

In the following dialogue example from a real Type 2 diabetes office conversation, the difference in disease treatment expectations are evident:

Doctor: So, there's no cure for diabetes; nobody's getting Nobel Prize pretty soon.
Patient: So, I'll have it the rest of my life?
Doctor: Correct. You will have it for the rest of your life, yes. Now, unless, again, unless somebody gets Nobel Prize for cure, but it doesn't look in the near future, so, okay?

Dissimilar conversational goals

Physicians and patients enter the exam-rooms with different agendas for their in-office conversations, affecting the way each participant approaches the conversation and their goals for the visit. Physicians enter the conversation with goals of efficiency, gathering and provisioning only relevant information. Patients, on the other hand, approach the conversation with goals more focused on relationship-building and total information provision.

Societal expectations also play a heavy role in defining the rules of engagement during the exam-room conversation. Physicians operate under the rules of efficiency, objectivity and authority, while patients obey the rules of cooperation, subjectivity and respect. These differences lead to numerous missteps along the way, as physicians try to efficiently collect information and patients attempt to make a relational connection while telling their story (e.g., quantitative vs. qualitative approaches).

Doctor: Tell me about your headaches.
Patient: Uh, lately I've had it, you know, a couple of my, you know, migraines, you know, and there's really no rhyme or reason to them they just, you know, I feel…
Doctor: Are you having more since last time I saw you, you think? You've been having more of them?
Patient: Uh, there was like two weeks ago where I went through like three of my Zomig in one week and that's kind of unusual and, you know, normally, you know, I don't go through that many in a week.

In this example, the physician cuts instantly to the most relevant information, while the patient tries to provide a more comprehensive overview of his condition.

Language disparity

Physicians commonly speak to patients in "medicalese" – highly technical, clinical language which can confuse and overwhelm patients. They tend to introduce a slew of unfamiliar terms without providing definitions to the patient. Dialogue research shows that this is especially common in specialist conversations such as cancer.

Technical talk is driven by any of several situations, including: physicians are ruled by goals of efficiency due to their busy schedules; physicians are trained as specialists, not educators, and speak in the language they know best; physicians may wish to remove stigma, embarrassment and emotion from the clinical situation, including blunting unfavorable news (e.g., cancer diagnosis communicated through histology).

Here is a dialogue example that shows how the physician's use of heavy medicalese has led the patient to miss important information regarding recent test results:

Doctor: We did the MRI of the cervical spine and the MRI of the brain. And they compare it the previous ones, which were done in 2008.
Patient: Okay.
Doctor: And based on the findings, so the MRI of the brain was done with contrast and it did show the presence of plaque within the right front and bilateral front of parietal white matter consistent with a known history of multiple sclerosis with acute demyelinative block, there's an acute block.
Patient: Okay, okay.
Doctor: In the left parietal ventricular white matter. No, so sorry, there was also new lesion in the right frontal subcortical white matter since the prior study.
Patient: Okay. So there's one on the left and one on the right, is that what I'm getting?
Doctor: Um-hum.
Patient: Because you spoke, uh, you spoke doctorese.
Doctor: Yeah.
Patient: So I don't always understand, but I heard acute -
Doctor: Yeah.
Patient: On the left and then new on the right.
Doctor: That's right.
Patient: Okay.
Doctor: That's right.
Patient: So how do we interpret all of that?
Doctor: That there's a little bit of progression with disease.
Patient: Okay.

Unbalanced decision-making

Patient involvement in the treatment decision is often minimal. Important aspects such as cost and patient health assessments may be omitted from the office visit, resulting in decisions being made without a patient's perspective or input.

As shown in the earlier graphic on interactivity (Figure 1), we know that physicians tend to dominate the in-office discussion, particularly as the conversation moves into the discussion of treatment. But what we've uncovered through the examination of dialogue is that patients have some conversational shortcomings which allow the physician to steadily take over the conversation at this crucial point.

- Patients are unsure of their role in decision-making and are uncertain of how to show ownership of their condition.
- While patients are financially responsible for treatment, cost discussions are largely initiated and guided by physicians.
- Patients' knowledge and understanding of treatment options is often limited across therapeutic categories, leaving the physician to make the decision.

The following dialogue example shows the patient's relinquishing of decision-making power to the doctor, a common occurrence which acts as a barrier to patient-centered decision-making:

Doctor: I'm thinking about adding a second medication in addition to the two tabs of Flomax that you're taking now. What do you think?
Patient: Well, you're the doctor.
Doctor: Okay, I'd like to recommend that.

Improve the outcomes

By understanding the top conversational gaps that occur within exam-room conversations, researchers are able to develop solutions that effectively address the gaps and improve the overall experience and outcomes of office visits. One approach is to incorporate the natural language of physicians and patients and respectfully bring together the agendas and roles of both physicians and patients. This also addresses the underlying attitudes and beliefs of both participants and can help guide them to decisions that are mutually satisfying.

The landscape and role of market research is constantly evolving, challenging the entire industry to provide new and innovative thinking to support key business objectives. Now more than ever, research teams are tasked to deliver unique customer insights faster and with less resources. New ethnographic methods such as in-office dialogue research offer the unscripted voice of customers and the ability to reach patient types and geographies not able or likely to participate in facility research. This insight into real, unaided dialogue between physicians and patients can help identify the tipping points that drive exam-room behavior, allowing for even more effective support of the goals of the health care industry.

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••• health care research

No one cares about your brand

What physician research can teach us about prioritizing people, not products

| By Soumya Roy and Kathryn Gallant

snapshot

The authors outline how segmenting doctors to understand their emotional drivers can help put the focus on the human side of the health care process and less on brand names and marketing.

Every self-respecting marketer backs up their million-dollar strategy with some kind of customer research. Most rely on segmentation: breaking up likely customers into groups that share distinct, defined perspectives on the brand. But what if customers don't actually shape their lives in the context of product suites? (Hint: They don't.) Our research with physicians suggests that if marketers want to connect, they'll have to start by accepting that their customers live beyond branding. Before we ask what they think about any product, we have to discover what they think about themselves.

But isn't this the era of the brand? It is if you ask a marketer. Today, entire programs are built around semi-sacred and amorphous "brand values." Every major agency promises "brand experiences" that "drive relevance" and, presumably, can make your company the next Apple or Google. Emotional, metaphoric customer relationships sure sound as important as (call us old-fashioned) sound business practices. The brand has become the stuff of marketing mythology: If you build it, they will come.

Even pharma jumped on this bandwagon. Twenty years ago, competition started to heat up across therapeutic categories, especially chronic diseases. Marketers veered away from the traditional attribute war, which they could lose, and began promoting each drug's intangibles: peace of mind, quality of life, etc. Suddenly, prescription medications had mystique. The health care "brand" was born.

In some ways, we suppose it is the era of the brand. Companies care about brands. Marketers care about brands. The only people who don't, unfortunately, are customers.

Customers care about themselves. They focus on the people, things, ideas and goals that matter most to them. They each have a story – we call it their "enduring self-concept." This story is about who they are and who they want to be. It's always a rich collection of emotions and beliefs, ideas and attitudes. This story can be furthered or hindered by all kinds of decisions, including product choices. But the customer, and no one else, will always be the star.

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Understand doctors' perspectives

We routinely conduct physician research to support pharma product launches. In order to refine a brand's value proposition, companies need to understand doctors' perspectives on solution gaps in various categories, along with what they think about medications. Typically, we engage doctors in that context – and we ask every question through the lens of a brand. What do you think of Brand X? And what would you like Brand Y to be like?

Recently, we started noticing that certain doctors felt more "comfortable" prescribing certain brands. Fair enough. But interestingly, our data couldn't tell us why, no matter how we crunched it. Nothing those doctors had expressed could explain these particular prescribing instincts. We were missing something big.

In response, we put our 10-year perspective to work and started looking at our previous studies' underlying assumptions. The biggest, of course, was that doctors cared about any brand. So we started over, conducting qualitative research followed by quantitative research on 450 doctors across the U.S. and EU. We wanted to know what was on their minds as they walked through the doors of their practices each day, before they encountered or thought about any brand.

We discovered something extraordinary. Most physicians could recall the exact moment that they knew they wanted to devote their lives to medicine. All expressed a strong point of view on their desired and perceived relationship to patients and their health. But not one expressed they had chosen to become a doctor so they could prescribe Lipitor. (Or Viagra. Or Plavix. You get the picture.)

Each doctor had an enduring self-concept that defined their role in the lives of patients. Some had chosen medicine to become heroes. Others chose it to become respected scientists. Others chose it to become modern wise men/women. Ultimately, we were able to identify six distinct physician portraits: Authoritarians, Bleeding Hearts, Regular Einsteins, Sages, Entrepreneurs and Crossing Guards.

Each physician portrait was driven by distinctly different motivators. Regular Einsteins favored

Physician Portrait Type	Choice for "Most Engaging" High Cholesterol Treatment Brand*	Engagement Drivers
Authoritarians These physicians like to be in control and assert their recommendations with confidence. They spend their energy getting results, not cultivating a warm-and-fuzzy bedside manner.	Crestor	Outcome-oriented Authoritarians chose Crestor based on their own experience and knowledge with the drug – they're reassured that it works for them.
Bleeding Hearts These doctors "feel your pain" – they're highly empathetic and patient-focused. They nurture strong relationships and prefer treatment plans that don't interfere too much with patients' lives.	Lipitor	Patient-centric Bleeding Hearts sensed that their patients liked Lipitor and responded empathetically in choosing this brand.
Regular Einsteins These physicians define themselves primarily as scientists. Their perspective on treatments is academic and intellectual. They follow the facts – and often prescribe innovative new products.	Lipitor	Science-driven Regular Einsteins connected with Lipitor based on scientific data and perceived clinical superiority.
Sages These doctors prize their wisdom and intuition. They're well-informed but they also base a lot of their decisions on their years of experience. They trust their own POV. They need to "feel comfortable" with any treatment plan.	Crestor	Sages cited feelings of comfort and conviction in choosing Crestor, a brand they trust based on their own accumulated wisdom.
Entrepreneurs These physicians are businesspeople. They can be excellent healers but each views their practice as a business and their patients as customers. They choose treatment plans as business decisions.	Crestor	Business-minded Entrepreneurs were motivated to choose Crestor by their desire to satisfy their patients as customers or clients.
Crossing Guards These doctors follow guidelines closely and rarely make controversial choices. They look at what other physicians are doing (cautiously following, never leading). They're all about safety first.	Zocor	Safety-first Crossing Guards made their decision by considering "just the facts," seeing Zocor as an easy and safe choice that they could trust.

* Based on Hall & Partners' Engager model, a proprietary brand equity metric.

boldly innovative products, while Sages were more concerned with being personally comfortable with treatment plans based on their vast experience. Authoritarians loved power (their own and that of the medications they prescribed), while Bleeding Hearts were entirely patient-focused, craving relationships and approval. Entrepreneurs showed preference for judging standards objectively and developing patients into satisfied customers, while Crossing Guards prioritized following guidelines and taking a relatively safe approach to treatment.

You may be thinking, “So what?” Doctors are entitled to have different personalities. But we all know they’re trained to be dispassionate and that they prescribe medications on purely rational grounds. Surely there can be no relationship between the enduring self-concepts of physicians and the drugs they prescribe. But in fact, we found direct correlations. Drug choices were not only linked to each physician’s “portrait,” they were also an expression of it.

Take treatment of high cholesterol. Lipitor, Crestor and Zocor are all leading statins: HMG-CoA reductase inhibitors that can effectively, safely lower cholesterol levels in patients. They’re not, of course, identical in their mechanisms. Depending on which cholesterol numbers a doctor and patient need to bring under control (e.g., triglycerides, HDL, LDL, total cholesterol), one statin – based on clear, objective, irrefutable numbers – will appear to be the “best” choice.

Of course, there are also side effects to consider. Statins are associated with cardiovascular events, especially when patients indulge in risky behaviors like smoking. These medications can also be hard on the liver. They can cause pain and weakness through the entire muscular system. So as much as physicians consider the appropriateness of a drug, we’d expect them to secondarily make their prescribing decisions based on patient tolerance. We certainly wouldn’t expect them to play favorites or prefer a medication on any other grounds.

But incredibly, we found that they do. When asked to identify their “top engaging brands” in high cholesterol treatment, each physician portrait-type chose products that reflected their own (previously-determined) enduring self-concept (see chart). They prescribed as the healer they’d always wanted to be.

Regular Einsteins and Bleeding Hearts felt most strongly about category leader Lipitor. Regular Einsteins were attracted to the brand’s category-leading attributes, while Bleeding Hearts responded to its patient-sensitive message. Authoritarians strongly preferred prescribing Crestor, fueled by feelings of reassurance; they associated the brand with “outcomes” for patients. Sages and Entrepreneurs also chose Crestor – Sages based on their personal experience with the brand and Entrepreneurs for the patient satisfaction it typically delivered. And finally, Crossing Guards demonstrated prescribing preference for

Zocor (simvastatin). Why? Because they sensed this well-established generic would be the least expensive and could be trusted. They felt it was the easiest choice.

Doctors, like all customers, are people first. Their treatment plans offer paths toward patient wellness but also toward personal goals and sating personal motivators. Every physician wants to feel safe and secure in their choices and each wants to feel they belong in the field and deserve respect. But like everyone else, they also need to express their values. They're driven to self-actualize.

Stop talking about themselves

It sounds simple, but it won't be: brands need to stop talking about themselves. Instead of looking for new, inventive ways to describe the brand, talk about what it does and explain why it's better (with some emotional positioning thrown in). Brands need to trigger the personal values of their customers by embracing who they are.

Brand messages will resonate far better when they're linked to enduring self-concepts. They'll be more relevant when they reflect customers' deepest-held beliefs. And they'll result in relationships that are deeper, richer and more meaningful when they further customers' most personal missions.

Brands (and researchers) can start by talking less and asking more. Segmentation will continue to be the foundational element of any marketing strategy and should. But to make segmentation more actionable and to use it as a springboard for crafting engaging communications strategies, brands must reach beyond their own context. We all need to do a better job of evaluating individuals' enduring self-concepts first, then their relationship with product categories and only then with brand attributes and promises.

More actionable segmentation will mean something different in every industry. In health care, we can imagine far superior training of pharma reps: teaching them to recognize physicians' enduring self-concept and support doctors' highest values. We can envision far more detailed and engaging conversations about what medications can do and the impact they can have on the lives of patients – all directed by subtle cues from the Regular Einsteins, Sages and Entrepreneurs among us.

But whatever it means, it will first require taking a step back and investigating who customers are when they roll out of bed in the morning – before they've made a single choice, let alone thought about choosing any product, pharmaceutical or otherwise. Because honestly, no one cares about your brand.

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••• satisfaction research

Mind the gap

How improvement-gap analysis can produce better satisfaction surveys

| By Adam S. Cook

snapshot

Beyond measuring a customer's satisfaction, it's perhaps even more critical to measure the importance of factors that contribute to their satisfaction. The author offers advice and examples of how to do so.

We see satisfaction studies everywhere: studies for employees (from human resources and department-to-department on support) and customers (on pricing, products, quality, services, etc.). It's ridiculous. For more than 10 years I've seen these surveys drawn up, delivered and analyzed (keep in mind, I use the word analyzed loosely here). I'm not sure a single one ever drove a hard decision that had a true impact.

Current satisfaction surveys are easy and convenient (because they've always been the same) but for the most part can be misguided. For example, an employee survey shows a decline in company communications over the last year. What do decision makers do? They choose to incorporate more internal company events and picnics to help open the lines of communication. Then, the next year we see an increase in satisfaction for company communications. We celebrate the improved satisfaction. Makes sense, doesn't it? Hang on. How do we know that company communications (more specifically, events and picnics) are even important to employees or, worse, if they have any impact on an employee's overall satisfaction or loyalty?

I've been quietly pushing a survey method that embraces a new line of thinking. When I look at current surveys, they already seem to have solutions in mind. I can't tell you how many times I've seen surveys that were designed with the goal of rationalizing a decision that was already made. It's time to take a hard look in the mirror and that starts by asking the "right" questions.

A side note on satisfaction surveys and their intended purpose: You don't need satisfaction surveys to figure out you have a poor product, service, managers, benefits, etc., or to figure out you have loyalty or growth issues. You need a survey to help understand what's causing these issues. I can share improvements in satisfaction scores until the cows come home but if we're losing customers and employees left and right, these results clearly don't mean a thing. This is another indicator that we're not asking the "right" questions.

Where should you start? First, ask respondents how important different factors are to them. You can include an open-ended response area to capture any factors you may

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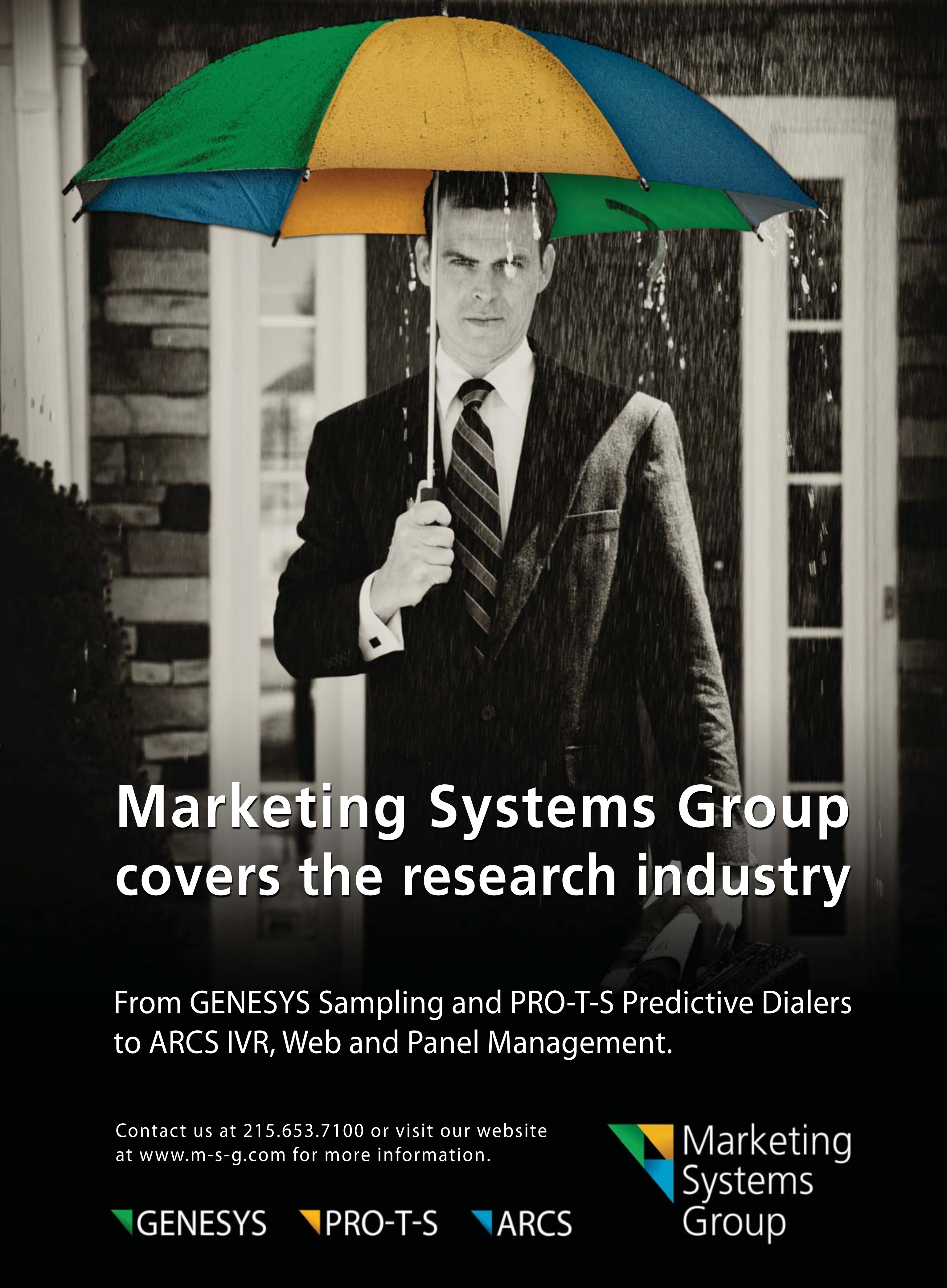

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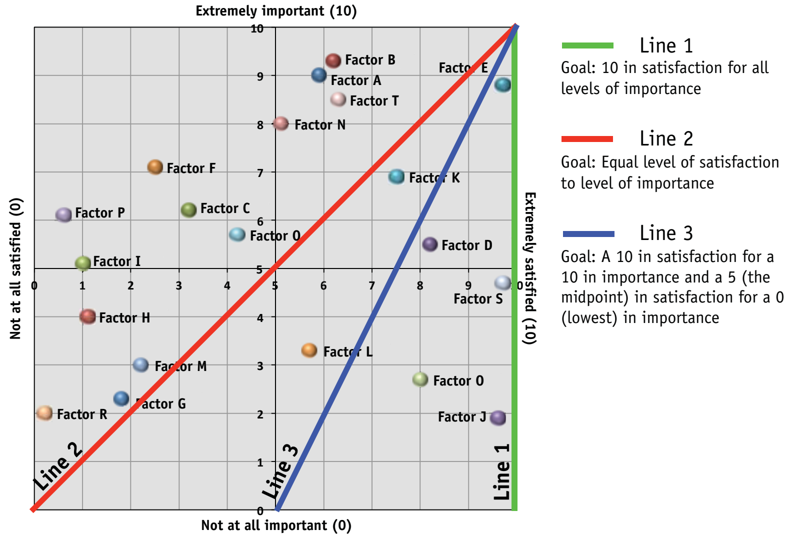
Figure 1

Improvement Gap Evaluation Options



not have included/listed.

Second, ask respondents how satisfied they are with the execution/delivery of these same factors. Responses in importance and satisfaction allow us to plot points on a grid (as seen in Figure 1). A zero-to-10 scale is used throughout my examples, but any scale should work.

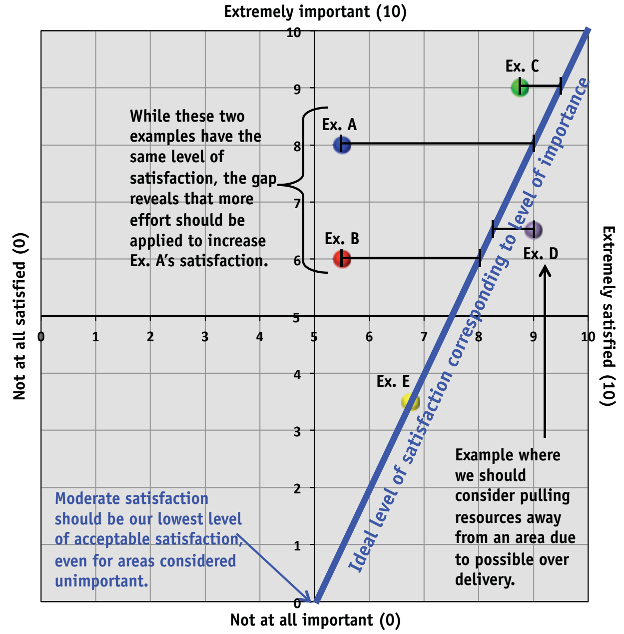
Life without importance measures always leads us to improving things with the lowest satisfaction. What we need to know is how important factors are before we start developing improvement plans.

Third, establish a standard or goal (here's where the magic begins). I typically ask people, if we're using a 0-to-10 importance scale and something is rated as a 10 in importance, what should we be aiming for in satisfaction? Easy, a 10. Now, what should we be aiming for in satisfaction if the importance rating is a 0? Here's where I typically get one of two answers.

- Some would say a 10. We should be striving for a 10 in satisfaction no matter how important something is to employees or customers (see Figure 1, Line 1). If this were the case, we wouldn't need to ask the importance question. If we have a lot of things that are not very important and we work really hard to knock them out of the park, aren't we taking time and resources away from those things that matter most and need improvement? I've taken a look around me lately and I don't have a lot of help to deliver 10s in everything, so I need to prioritize. In this case, Factor R from Figure 1 would receive top priority for improvement but it's the second-least important factor. I can understand setting a high standard but a sweeping high standard without considerations for importance diminishes our ability to prioritize,

Figure 2

Understanding and Using Improvement Gaps



especially with limited resources to improve areas of satisfaction.

- Some would say a 0 in satisfaction is acceptable for unimportant factors. If it's not important, we don't need to spend any time satisfying customers. The problem is, we never want bad satisfaction, even if that factor isn't as important. Plus, it's important to some, just not the majority, in the case of looking at average scores (see Figure 1, Line 2). When setting the bar too low or when dissatisfaction is acceptable, we open the door to neglecting the minority and delivering bad service, or no service, which can come back to haunt us in the long run.

My compromise is the middle. If it's not important at all and we're going to provide the product or service, we should still, at the very least, strive to deliver moderate/mediocre satisfaction (a 5 in this case). By setting the bottom mark to moderate satisfaction we are setting a tone that satisfaction is always important but to a certain degree across different factors (see Figure 1, Line 3).

We have a line

Great, now we have a line. A maximum of 10 in importance equals a 10 in satisfaction and a minimum of 0 in importance equals a 5 in satisfaction. I call this "ideal level of satisfaction corresponding to the level of importance line" or the "satisfaction goal line." If something equals X in importance we now have an idea of what we would like to achieve or should be achieving in satisfaction. So why is this line important? It gives us a baseline for identifying areas of potential improvement. The further away from the line results are in satisfaction, the greater need for improvement (see Figure 2 for an example of variations in gaps).

How do you calculate and use the gaps? We now need to calculate the distance from the actual response to the ideal level of satisfaction (see Figure 3 for formula).

Your ability to calculate the slope of a line makes all the difference here. If your scales for importance and satisfaction are equal and you use my maximum and minimum standards, the slope will always equal 2; otherwise, you'll need to be able to calculate a slope when using a different line or unequal scales.

Figure 4 shows how the formula varies across different scales of equal range in importance and satisfaction.

A different lens

Now what? We can rank the importance scores and we can rank satisfaction but now we can also rank gaps (or largest areas for improvement). Gaps are just

Figure 3

Improvement Gap Formula

$$\text{Satisfaction Score} - \left(\left(\text{Importance Score} \div \text{Slope} \right) + \left(\text{Highest Scale Number} \div 2 \right) \right)$$

Figure 4

Improvement Gap Formulas for Varying Scales

Scale	Excel Formula	Scale Midpoint	Respondent given option to select midpoint
0 - 10	=(SAT)-(IMP/2+5)	5	Yes
1 - 11	=(SAT)-(IMP/2+5.5)	6	Yes
0 - 9	=(SAT)-(IMP/2+4.5)	4.5	No
1 - 10	=(SAT)-(IMP/2+5)	5.5	No
0 - 8	=(SAT)-(IMP/2+4)	4	Yes
1 - 9	=(SAT)-(IMP/2+4.5)	5	Yes
0 - 7	=(SAT)-(IMP/2+3.5)	3.5	No
1 - 8	=(SAT)-(IMP/2+4)	4.5	No
0 - 6	=(SAT)-(IMP/2+3)	3	Yes
1 - 7	=(SAT)-(IMP/2+3.5)	4	Yes
0 - 5	=(SAT)-(IMP/2+2.5)	2.5	No
1 - 6	=(SAT)-(IMP/2+3)	3.5	No
0 - 4	=(SAT)-(IMP/2+2)	2	Yes
1 - 5	=(SAT)-(IMP/2+2.5)	3	Yes

SAT = Satisfaction Score

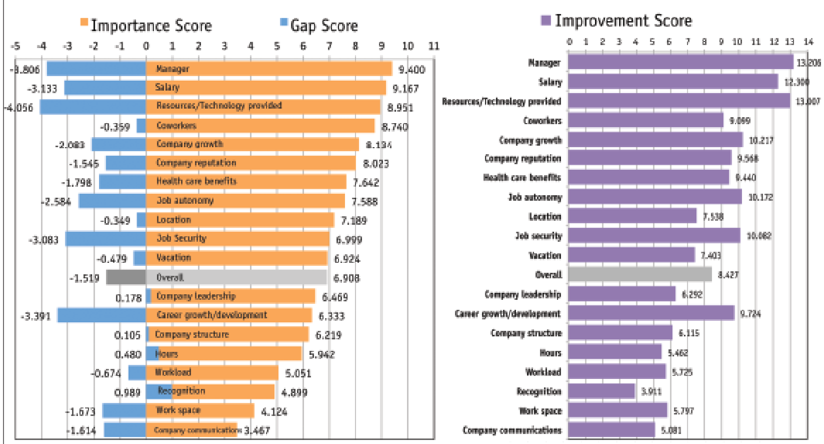
IMP = Importance Score

Figure 5

Improvement Score Formula and Visuals

<u>Formula:</u>
Importance Score – Gap Score

<u>Calculation Example:</u>
Managers (9.4) – (-3.806) = 13.206



a different lens for us to look at satisfaction scores. This gives us an idea of areas that need the most improvement and can help us in prioritizing efforts but the rank order isn't ironclad for prioritizing. Like I mentioned before, levels of importance need to be considered. Just because we need to improve something doesn't necessarily mean we should make it Priority One. The largest gap areas highest in importance should be our focus and priorities. If there are "positive" gaps, this may actually mean we are over-servicing customers (as demonstrated in Figure 2, Ex. D). Resources and efforts can be reduced in these positive-gap areas without significant harm to our overall service and satisfaction.

Here's where I really geek the process up. If we simply used gap scores and importance rankings to evaluate priorities, we wouldn't be able to account for variances in the importance scores. This would also leave a lot of subjective decision-making on areas of focus. So I created one last calculation or score: the improvement score. It occurred to me that I could use the length of the gap and importance scores to mathematically assess priorities (see Figure 5 for formula and visual examples).

Let's look at an example. If we were to perform a gap analysis on 11 factors (A-K) and received results back as seen in Figure 6, all the gaps would be equal (-2 in this instance). If all gaps are equal, where would we be best served to focus our improvements? Answer: the areas highest in importance.

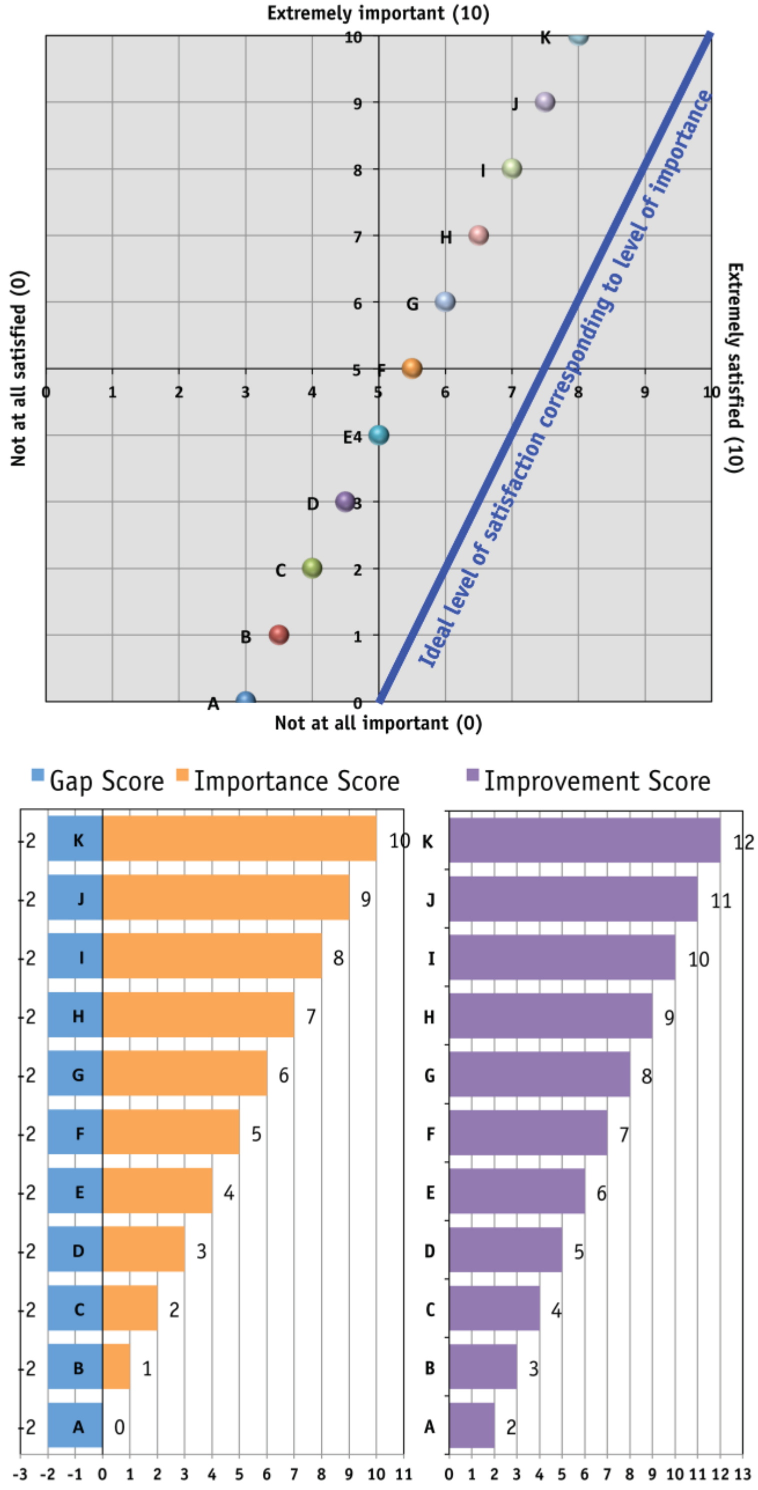
Some idealists would say if we can increase the levels of importance in areas in which we do well in satisfaction, we can close our gaps. I say good luck. Changing one's perceptions or values is a lot more difficult than our ability to change satisfaction levels. Let's focus on increasing satisfaction in the largest gap areas. Better yet, choose the largest gap areas that are greatest in importance. This should yield a greater return in overall satisfaction.

Does the 0-to-10 scale need to be used? I prefer 0-to-10 but just about any scale should work. With some research platforms or delivery mechanisms, we're forced to use scales like 1-to-10 or 1-to-5. That's not ideal but it's still directionally correct. I would recommend a minimum of a five-point scale. The more points you can get

Figure 6

Example Demonstrating the Value of Improvement Scores

Equal Gaps (-2)



away with using the better direction the results should yield. Also try to use a scale where there's a true midpoint for respondents. A 1-to-10 scale doesn't have a whole-number midpoint (5.5) whereas 0-to-10 does (5).

Once the improvement scores (large gap areas, high in importance) have been calculated, decision makers need to develop a strategic plan for reducing those gaps. Selecting one-to-five areas is ideal, because once you start pushing closer to 10 areas you may find that you bit off more than you could chew. The next task is a plan for moving the needle (closing the gap). Don't let decision makers think the improvement scores are the be-all and end-all in prioritizing. Ultimately, leaders and managers also need to make final decisions based on additional factors like resources, costs, time or feasibility.

Sorry, those Staples Easy Buttons don't exist in the real world but the improvement score is what I would call an Easier Button. Once a plan has been developed and put into action, we can now measure whether changes were able to move that needle. Again, the aim isn't to get better results in satisfaction on the next survey, it's to improve actual satisfaction, which is better measured through increased productivity, reduction in turnover and growth in revenue. For media companies like where I work, an increase in audience size and frequency is the ultimate metric.

What the process looks like

I'd like to give you an idea of what this process looks like in reality by using a process of: establishing an objective; developing the questions/survey; tabulating results and charts; analyzing the results; and developing a plan of action and continually tracking. The following case is a hypothetical example and does not reflect actual survey questions or responses.

1. **Establishing an objective.** Identify areas or threats for possible employee dissatisfaction or potential turnover.
2. **Developing the questions/survey.** A sample question might be as follows:

How IMPORTANT are the following to you when it comes to working for Company X: (using an anchor scale where 0 = not at all important and 10 = extremely important)

Location
Company reputation
Company growth
Company structure
Company leadership
Company communications
Health care benefits
Vacation
Hours
Salary
Manager
Coworkers
Career growth/development
Work load
Job autonomy
Job security
Work space

Figure 7

Example Results and Scoring

	Average Scores			
	Importance	Satisfaction	Gap	Improvement
Manager	9.400	5.894	-3.806	13.206
Salary	9.167	6.451	-3.133	12.300
Resources/Technology provided	8.951	5.420	-4.056	13.007
Coworkers	8.740	9.011	-0.359	9.099
Company growth	8.134	6.984	-2.083	10.217
Company reputation	8.023	7.467	-1.545	9.568
Health care benefits	7.642	7.023	-1.798	9.440
Job autonomy	7.588	6.210	-2.584	10.172
Location	7.189	8.246	-0.349	7.538
Job security	6.999	5.417	-3.083	10.082
Vacation	6.924	7.983	-0.479	7.403
Company leadership	6.469	8.412	0.178	6.292
Career growth/development	6.333	4.776	-3.391	9.724
Company structure	6.219	8.214	0.105	6.115
Hours	5.942	8.451	0.480	5.462
Workload	5.051	6.852	-0.674	5.725
Recognition	4.899	8.438	0.989	3.911
Work space	4.124	5.389	-1.673	5.797
Company communications	3.467	5.120	-1.614	5.081
Overall	6.908	6.935	-1.519	8.427

Score Calculation Examples (Manager)

Gap: 5.894 - [(9.4/2) + (10/2)] = -3.806

Improvement: 9.4 - (-3.806) = 13.206

Recognition
Resources/Technology provided
Others not listed that are "extremely important" to you:

How SATISFIED are you with the following when it comes to working for Company X:
(using an anchor scale where 0 = not at satisfied and 10 = extremely satisfied)

Use the same factors listed in the importance question with a subtle change to the last answer option:

If listed other areas of "extreme importance," how satisfied?

Include basic questions for: job function; department; whether they are a manager; years with company; full-time vs. part-time; plus any others of importance for evaluation. And if possible/necessary: age; gender; race/ethnicity; plus any others of importance for evaluation.

Started to wobble

I recently came across a survey conducted many years ago for our daily newspaper's sports department. At first, the survey looked like the gap method described here. It asked questions about how interested readers were in different sports and then asked questions about how well we were covering those sports (using satisfaction). The points were even plotted on a grid. Then the house of cards started to wobble.

Three potential mistakes were made. One, the analysis was completed on adults in general, not our customers/readers. Two, after the points where plotted on the grid, a "quadrant evaluation" (sometimes referenced as a quadrant analysis) was completed. I'm a believer that quadrant evaluations are best for basic groupings or segmentation but not for analysis or prioritizing. Three, while it would appear that asking how interested readers were in different sports is the right direction, there was never a connection to our product.

Confused? As a hypothetical example, let's say professional hockey (NHL) finished at the top of the list in areas of interest. Yes, they were interested and their satisfaction was low but was it important that we cover it in our sports section? As we came to find out many years later, IT ISN'T important. Ouch!

First, I'm not sure if our readers showed high levels of interest in professional hockey but even if they did, it never occurred to anyone that those readers prefer getting their NHL coverage from another source. Even worse, if it was non-readers who felt this way, we ended up changing our product to appeal to them at the cost of losing our most loyal readers who wanted better coverage in another sport.

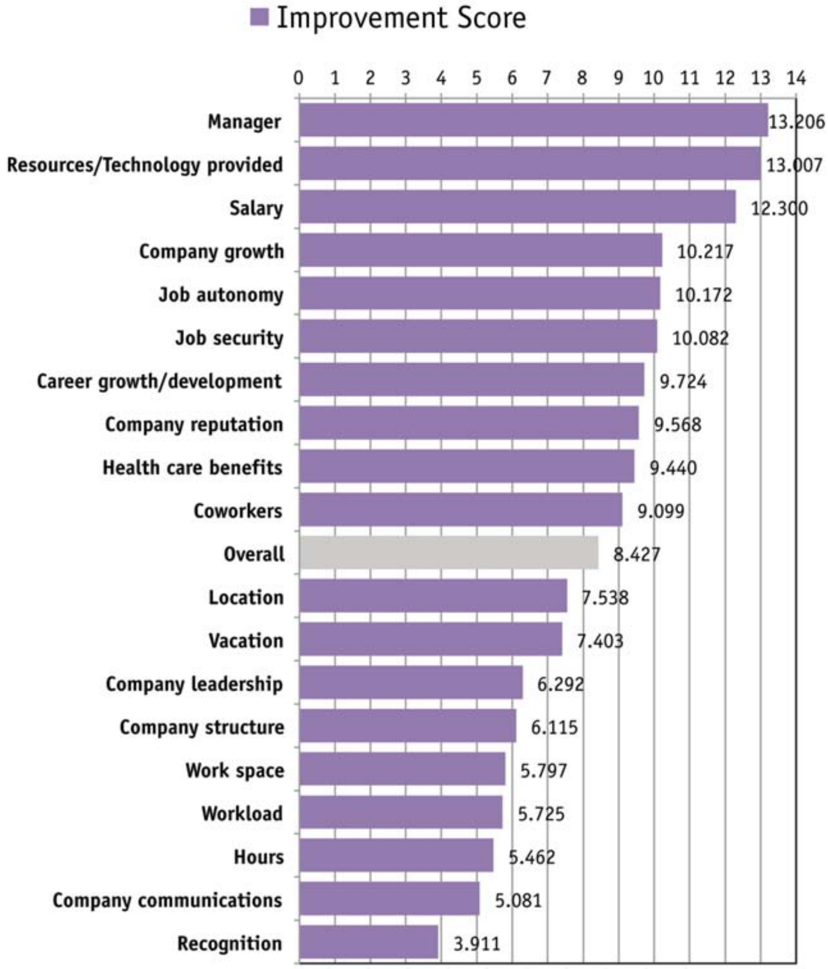
Potentially misguided results are what you will most likely receive when using general "interest" questions; although with some work and testing there may be a way around it (maintaining some flexibility is always important). I'm going to stick to using importance questions directly tied to our current or potential products and services for now.

3. **Tabulating results and charts (see Figures 7 and 8 for examples).** Now, if we were using the old method we would have only looked at satisfaction scores. In this instance, decision makers would have pointed to career growth/development as the area in which they needed to improve performance because it was the only factor that fell below a 5 (or the midpoint) in satisfaction. Then they would have patted themselves on the back for such a strong overall satisfaction rating. Others would have looked to the same satisfaction ranking and said we need to work on the lowest three scores. In this case, that would have been career growth/development, company communications and work space. This is better than the previous mentality but still misguided.

If we only looked at the gaps, "resources/technology provided," "manager" and "career growth/development" would have been the primary focus. As you can see, there are already differences in priorities when using the gap but we still need to consider importance. This is where the importance score delivers

Figure 8

Ranking of Improvement Scores



Research Company Spotlight - Customer Satisfaction

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Anderson, Niebuhr & Associates, Inc. » SEE AD p. 80
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Bare International
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www.bareinternational.com

Frances Bauman Associates
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Behavior Research Center
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The Channel Checkers
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CJ Olson Market Research, Inc.
612-378-5040
www.cjolson.com

Clarion Research Inc.
212-664-1100
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Clearworks
888-769-3807
www.clearworks.net

CMI
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www.cmiresearch.com

CMS Research
419-843-8570
www.cmsresearch.com

CodingExperts
972-727-1850
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Competitive Edge Research
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ComSim, Inc.
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Convergys Analytics Solutions
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800-461-3924
www.corsential.com

Customer Lifecycle, LLC
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www.customerlifecycle.us

Customer Service Profiles (CSP)
402-399-8790 x101
www.csp.com

The Dallas Marketing Group, Inc.
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www.the-dmg.com

Deep See
914-948-8833
www.deepseeresearch.com

The Dieringer Research Group, Inc.
262-432-5200
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www.digitalresearch.com

Directional Insights
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www.directionalinsights.com

Directions Research, Inc.
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www.directionsresearch.com

The Dunvegan Group, Ltd.
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www.marsresearch.com

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502-749-6100
www.measurecp.com

Morpace Inc.
248-737-5300
www.morpace.com

MRSI (Marketing Research Services, Inc.)
513-579-1555
www.mrsi.com

The MSR Group
402-392-0755
www.themsrgroup.com

Multivariate Solutions
646-257-3794
www.mvsolution.com

its greatest value and helps focus our efforts in Step 4, analysis.

4. **Analyzing the results.** Use the improvement scores, calculated from gap and importance scores, for evaluating and prioritizing areas of improvement (see Figure 8). It's also wise to look at improvement and gap scores across different departments, job descriptions, length of service, etc. You should be able to see how the focus changes when looking at the results through multiple lenses.

5. **Developing a plan of action.** After identifying the areas of focus rising to the top in Figure 9, we now develop a plan for shrinking/reducing those gaps. In this instance, resources and/or budgets allocated for "recognition" can probably be reduced and moved to help improve other areas (salary, bonus or resources). Manager evaluations and training would need serious considerations in this case. Specific strategies may need to be addressed if there are differences in scores and rankings across different departments, job functions, etc.

6. **Continually track.** After the strategic plan has been implemented, we'll want to go back to the field to measure progress and help identify any new directions the company should take. When we do this, we have established an ongoing program for measuring and directing improvements, one where we continually learn and then adapt. (This learn-adapt, learn-adapt, learn-adapt or "LA, LA, LA concept" was coined by John Caples, one of the greatest advertising copywriters and author of *Tested Advertising Methods*.)

Be an eye-opener

I can attest to seeing this method's successful use for internal purposes, with outlining strategic direction, finding product improvements and with identifying new product opportunities for my company as well as others we work with locally. We've also found it to be helpful in uncovering areas of focus for advertising and branding efforts. At the very least, the importance measures will be an eye-opener to decision makers and will aid them in resource priorities and time allocation. For more information and visual examples on the improvement gap method, visit my blog at www.fightinanalyst.com.

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Research Company Spotlight - Customer Satisfaction

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510-352-4943
www.opinionmeter.com

PAI-Productive Access, Inc.
800-693-3111
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Persuadable Research Corporation
913-385-1700 x302
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Polaris Marketing Research
888-816-8700
www.polarismr.com

Precision Opinion » SEE AD p. 325
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www.precisionopinion.com

Precision Research Inc.
602-997-9711
www.precisionresearchinc.com

Quality Solutions, Inc. » SEE AD p. 61
800-471-1646
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Radius EMEA
44-203-130-0707
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RDA Group
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315-635-9802
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Revelation Research » SEE AD p. 69
503-808-1492
www.revelationglobal.com

RitterAssociates
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www.ritterassociates.com

Rockbridge Associates, Inc.
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www.rockresearch.com

RTi
203-324-2420
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Schwartz Research & Consulting
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Service Excellence Group, Inc.
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www.serviceexcellencegroup.com

SIS International Research, Inc. » SEE AD p. 42
212-505-6805
www.sismarketresearch.com

StrataMark Dynamic Solutions
513-338-1124
www.stratamarkds.com

Strategex, Inc.
312-551-0505 x121
www.strategex.com

Strategic Research Initiatives LLC
480-457-1688

Target Research Group Inc.
845-426-1200
www.targetresearchgroup.com

Targoz Strategic Marketing
615-410-4553
www.targoz.com

TARP Worldwide
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www.tarp.com

Toluna » SEE AD pp. 44-45
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http://us.toluna-group.com/

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www.trchome.com

Triad Research Group, Inc.
440-895-5353
www.triad-research.com

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770-604-9980
www.turnerresearch.com

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Vision One Research Ltd.
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www.visiononeresearch.com

Voter Consumer Research
281-893-1010 x101
www.vcrhouston.com

WB&A Market Research
410-721-0500
www.WBandA.com

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602-707-0050
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customer experience

Still waters run deep

Is emotional response the important missing variable in customer experience measurement?

| By Jon D. Morris and Cathy Gwynn

snapshot

The authors offer a way to measure the impact of emotions, using a car-rental example to show the benefits of asking customers how they feel about seemingly emotion-free transactions.

If you attended a marketing or marketing research conference in the last few years you would think that understanding the feelings of the target market is paramount these days. Most speakers spend much of the time talking about the input from consumers or other audience groups and a portion of that time is directed toward mood or affect. Why, then, is so little attention being paid to effectively measuring these emotional reactions?

In some cases it may be that the marketer believes that determining liking or likability is sufficient. But many studies including Morris et al (2002) have shown that liking is not only poorly descriptive but it is often confounded. Respondents, for example, are unable to bifurcate liking of the stimulus from the product. In many instances, "liking" does not fit as an accurate description of the emotional response because emotions are much richer and more complex than simply level of appeal.

Another reason this important variable goes missing is the difficulty in interpreting the response variations. Unlike the rational questions, where the answer is either yes or no or some level of response, with emotions the substance of the findings is segmented. This makes interpretation more complicated – but in most instances so much richer and more valuable.

There is also a tendency for marketers to mislabel need states, desires or even rational factors as emotions and, as a consequence, not truly understand the emotional dynamics at work. One example is the statement that being connected is an emotion. Emotions do provide connections, but "connected" is not an emotion, even if people say they "feel connected." Being connected or having a sense of connection may elicit a variety of different emotions that could range from stimulated, excited or victorious to confident, appreciative, secure, relaxed, etc., depending on situation and context. Measuring the strength of the connection is part of the picture but in order to determine the emotional response it is extremely important to also determine the affect by

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measuring appeal or valence (+ or -).

Accurately evaluating and interpreting emotional responses can yield actionable insights and help marketers break through and more fully understand the dynamics at work in the marketplace.

Powerful influencers of behavior

So how should marketers approach emotions? It starts with the understanding that emotions are not just touchy-feely reactions. Rather, emotions are powerful influencers of behavior, relationships, evaluation and consideration. In fact, human responses are generally a combination of rational and emotional processing. In actuality there is no such thing as a purely rational decision but there are purely emotional decisions.

Affective neuroscience, at the turn of this millennium, has firmly entrenched itself in brain scan research. Drawing from the findings of forerunners such as Damasio (1994) and LeDoux (1989), researchers have established the fact that the brain circuitry of emotion and cognition is interactive but is now shown to be separate. Data has shown that there are parts of the brain that are dedicated exclusively to affect and the dimensions of emotion (Morris et al., 2009). Emotional response is hardwired in the brain.

Recent studies have shown that the architecture of the brain does not honor the age-old concept of segregation of cognition and affect. Most compelling, cognition appears to be rudderless without emotion. Studies in cognitive neuroscience and behavioral science should not be conducted without taking emotion into account (Morris et al., 2009; Morris et al., 2002).

It is also important to remember that not everything that lights up or produces the bold signal in the brain when seen on an fMRI is the measurement of an emotional response. It is clear that some neuro-responses are reactions to reactions.

Another important point to understand – one is often overlooked in market research measures – is that emotions consist of three dimensions. Effectively measuring and understanding the implications of the dimensions provides greater diagnostic insight during analysis. A three-dimensional concept of emotion has long received acceptance in psychological research because a one-dimensional construct is not robust enough to incorporate all aspects of emotional response (Osgood, Suci and Tannenbaum, 1957; Mehrabian and Russell, 1977). For example, some researchers have used a discrete self-report approach that focuses on specific emotions such as happiness and anger (Izard, 1977; Plutchik, 1984). The discrete approach assumes that individuals can regularly distinguish their feelings using the correct words. If this were case, then phrases like "I hate milk" or "I love orange juice" would never be heard. Emotional responses are a judgment of sensations and those are better analyzed or estimated using a dimensional rating scale.

One example of this three-dimensional approach is the pleasure–displeasure (appeal), arousal–calm (engagement) and dominance–submissiveness (empowerment) model (Mehrabian and Russell, 1977). These three bipolar dimensions are independent of each other and the variance of emotional responses can be identified with their positions along these three dimensions. The dimensional approach helps differentiate emotions postulated by the discrete approach by providing a numeric level of each dimension to describe the specific emotions. Specific combinations of the dimensions can identify each discrete emotion. The meaning of these specific adjectives may differ by individual, culture or other influences; nevertheless, the method for identifying the response is universal.

The three-dimensional construct has been found to be more valid, more reliable and contained more pertinent information about emotion than the categorical models (Havlena and Holbrook 1986). One neurological study using fMRI has confirmed the presence of these dimensions of emotion in the brain (Morris et al., *Human Brain Mapping*, 2009).

Two different techniques

Measuring emotional response using the three-dimensional concept of emotion (appeal, engagement, empowerment) can be accomplished with two different techniques: a verbal checklist composed of up to 16 bipolar adjectives in a questionnaire, or a nonverbal manikin (graphic character) for respondents to use to express their feelings about any stimulus or in response to questions. The verbal process accumulates scores from the checklist, and then collapses them into the three dimensions. The manikin measures the dimensions directly.

The SAM (self-assessment manikin) scale was found to be effective and less time-consuming than common verbal measures of emotional response because it does not require the respondent to translate complex emotions into words. When adjective checklists or semantic differential scales are used to assess emotional response, the precise meaning of the emotional words may vary from person to person. There is also the lack of universally-accepted adjectives. The use of open-ended questions that ask respondents to describe their emotional responses to communication messages is also problematic (Stout and Rust, 1986; Stout and Leckenby, 1986). Both approaches require a significant amount of cognitive processing.

It is also difficult to design a word-based instrument where the meanings are the same when translated from language to language. Clearly some words are similar but some are not. The nonverbal measurement system, SAM, eliminates the language biases and was shown to be a reliable method for measuring the three dimensions of emotion: pleasure (appeal), arousal (engagement), and dominance (empowerment) (Lang, 1980; Lang 1985; Morris and Waine, 1993; Morris, 1995).

More fully comprehend

Tapping into and understanding emotions enables researchers and consultants to more fully comprehend why people think, feel and act the way they do. The understanding of emotions and the measurement tools available have evolved to better arm researchers with the ability to reliably extract robust insights. There seems to be a tendency, however, for marketers to limit the measurement of emotion to what are deemed to be intuitively emotional contexts, rather than seeking to also understand the emotional dynamics at work in what is perceived to be functionally-oriented or information-oriented contexts. For example, marketers may limit the incorporation of emotional response measures to communications messages intended to be emotionally focused or to categories of products where purchase is considered to be driven more by emotions. Pigeonholing the measure of emotion, however, can cause marketers to miss valuable insights or connection points with their audiences.

It might be difficult to comprehend that emotional response plays an important role in something as mundane as car rental. However, measuring and evaluating emotions can be highly beneficial to a brand for several purposes, including segmentation. Standard metrics may focus on customer satisfaction or may include segmentation based on demographics, rental preferences and behavior and perhaps psychographics. But that only provides part of the picture.

In this case study example, several questions were composed and included in a Consumer Pulse omnibus study to better understand the emotional dynamics involved in renting a car, with the goal of gaining insights that a company could use to differentiate within an often price-driven category. The emotional response was measured with a nonverbal measure of emotion (AdSAM), while open-end questions were used as follow-ons to identify specific factors triggering or contributing to the feelings. Questions included:

How did you feel about your overall experience during your most recent car rental with (brand)? What specifically made you feel that way? (open-end)

Now, thinking about a time when a car rental experience exceeded your expectations, how did that make you feel?' What specifically made you feel that way? (open-end)

Thinking about a time when a car rental experience did not meet your expectations, how did that make you feel? What specifically made you feel that way? (open-end)

The analysis was composed of two phases: 1) specific brand experience comparisons and overall assessment of the emotional dynamics surrounding expectations and rental experiences; and 2) market segmentation based on emotional impact of rental experiences.

The nonverbal measure of emotion, AdSAM, used in the study measures emotions on three dimensions: appeal, engagement and empowerment (to see examples of the manikins go to www.adsam.com/survey/). The nonverbal manikin measures the dimensions of emotions directly by having respondents select one graphic character on each of three rows (representing level of appeal, level of engagement and level of empowerment).

Lack of differentiation

The first phase of analysis demonstrated the lack of differentiation between feelings about brands based on the actual rental experience and reflected a marked lack of engagement associated with the category.

As long as expectations are met, the silent majority of customers may feel positively but the passive nature of their feelings indicates that marketers who stop there and only focus on level of appeal, or only focus on satisfaction, may overlook opportunities to strengthen engagement and hence, brand loyalty.

Being satisfied or having a "good" experience does not necessarily mean that customers have an emotionally gratifying experience, nor does it mean the experience helps to develop strong affinity or advocacy for a brand.

In the perceptual map showing the results for feelings about their most recent rental experience (Figure 1), the vertical axis represents levels of appeal, from very negative at the bottom to very positive at the top. The horizontal axis represents engagement, ranging from very unengaged on the left to highly engaged on the right. The level of empowerment or control the respondent felt during the experience is depicted by the size of the mean response dot. A larger dot reflects higher feelings of empowerment or control, a smaller dot reflects lower levels of these feelings. In the car-rental example shown here, all of the dots are the same size, indicating uniform levels of empowerment or control. The adjectives in the space are derived from the modeling database. Each emotion adjective has a measured appeal, engagement and empowerment score to define it. The emotion adjectives are used as frames of reference on the map to describe the types of emotions that exist in the specific areas of the emotion space.

As can been seen in the map, none of the rental car brands strongly engage or empower consumers, although the rental experience with the brand is positive. Specific feelings evoked among the majority of renters for each brand include subdued, consoled, modest and reserved. These feelings are not particularly rewarding or high in engagement or empowerment and are largely a result of fundamental expectations being met (e.g., the car being ready, having a "good" car, not experiencing any problems/everything going smoothly, receiving good service).

Digging deeper, the second component of the analysis evaluated the emotional dynamics of experiences that exceeded expectations and experiences that did not meet expectations and then incorporated the results into a segmentation approach. Four segments were identified by computing and analyzing differences between the type of emotional gratification renters receive from an experience that exceeds expectations and the type of emotional impact an experience that does not meet expectations elicits. Segments were then profiled by demographic and attitudinal variables related to car rental.

The perceptual map in Figure 2 shows the differences between each segment's mean feelings when a rental car experience exceeds expectations (green squares) and when the experience does not meet expecations (red squares).

Although smaller in market size, Segments 1 and 4 represent the greatest potential for developing brand advocates through experiences that go above and beyond expectations. On the flipside, the greatest risks to a brand come from not delivering on expectations to Segments 2 and 4. Understanding the emotional dynamics and characteristics of each segment can provide direction for operational emphasis, loyalty and retention programs and marketing communications.

Segment 1: "Delight Me" (11 percent)

This group is thrilled by unexpected upgrades and surprise VIP treatment. This segment is the most motivated and empowered by experiences that exceed expectations. The car is a key driver of their emotional gratification. Experiences that exceed expectations make them feel victorious, triumphant and alive – feelings that reflect receipt of motivating benefits. For these consumers, reinforcing the value or reward of their rental experience (e.g., nice car, great price, feeling appreciated as a customer) and having clear contracts and documentation are things that can make them feel empowered. Moreover, they are delighted by unexpected upgrades, proactive customer appreciation (e.g., extra gas money if they have to wait) and being made to feel special. When this group's expectations are not met, they become saddened and emotionally disengage. Empowerment significantly diminishes.

Older, dirty or unreliable cars are key drivers of disappointment and leave these renters feeling cheated. Customer service representatives who do not take responsibility for issues greatly sadden them and turn them off to the company. The passive nature of these feelings indicates that these renters are more likely to quietly reject a company rather than voice their dissatisfaction.

A key to connecting with this group is to make them feel rewarded, not taken advantage of. This segment is more likely to consist of women, ages 35-64, who are college-educated. Psychologically, they are security seekers who are driven by the need to feel safe and in control.

Segment 2: "Put Me In Control" (56 percent)

This group needs to be in control and empowered. For Segment 2, experiences that exceed expectations keep them relaxed and secure rather than excite and engage them, thus they are difficult to develop into advocates. This group wants to be treated with respect and to have few worries. Anything that makes the process easy, pleasant and efficient resonates well with them and elicits relaxed, untroubled, secure, protected feelings. Counter-bypass privileges or procedures and professionalism that get them in and out with no hassle reinforce emotional gratification.

Of greater importance to pay attention to is the fact that these consumers actually feel betrayed and disadvantaged if a rental experience does not meet their expectations. Experiences that do not meet expectations make them lose their sense of security and control, eliciting intense negative, low empowerment feelings (aggravated, stressed and horrified) that can do damage to a brand.

Not having the car that they reserved available creates a great deal of stress; while long waits, rude associates and unexpected charges cause aggravation. The intensity of their negative feelings is a good indicator that they will actively share their experience with others (negative word-of-mouth) and will be unlikely to rent from the company again. This group consists of more men than women, is better-educated and indexes higher as thinkers who are curious and have some drive for power and status.

Segment 3: "I'm Indifferent and Don't Really Care" (23 percent)

Segment 3 is largely apathetic about car rentals and shows the least difference emotionally between a rental experience that exceeds expectations and one that did not meet expectations. Many of these renters have never had a rental experience that they believe exceeded their expectations and are mostly ambivalent (aloof, cynical) about a situation that does not meet their expectations. In fact, because of their vanilla expectations, many have not had an experience that did not meet their expectations.

Although they are difficult to engage through the rental experience, these renters do look forward to being treated well. Courteous, friendly service can warm them; however, they are some of the most difficult consumers to move because of their general apathy.

Upgrades and gifts reinforce feeling of power and status, while having their "name in lights" (counter bypass) signifies to them they are important, which can help build some affinity. This group consists of more men than women, skewing either under-35 or 50-64, with bachelor's degrees. Psychologically, they are status seekers who are driven by status and having a position of power. Rental experiences, however, do little to either strengthen or diminish their feelings of empowerment.

Segment 4: "Don't Reject Me" (10 percent)

These renters have strong expectations and can be demanding. They want to be taken care of. Exceeding expectations can pay off well because these experiences excite and motivate, often coming across as a pleasant surprise (surprised, amazed, excited, cheerful). Customer service plays a substantial role in creating the emotional engagement. However, many of these consumers become dismissive (unimpressed, bored, unexcited, uninterested) and may write-off a company when an experience does not meet their expectation.

Another one-quarter feels enraged, angry, hostile or disgusted, which can spell trouble for a brand. Avoiding mistakes and keeping things on the level is the key to connecting with this group.

Segment 4 predominantly consists of women, ages 35-49, who hold a bachelor's degree or have some college, earning $25,000-$75,000. Psychologically they are traditionalists who have a strong sense of right and wrong but want to be cared for rather than be strongly independent.

Offers multiple benefits

Emotional responses are an integral part of the consumer experience. Understanding the emotional dynamics that occur, whether during interaction with a product, in response to marketing communications or other experiential situations offers multiple benefits to marketers. All too often, however, this important variable goes missing from market research studies because of lack of understanding of emotions and what should be measured, because some may consider it to be a more "qualitative" analysis or because emotion is not deemed to play a role in decision-making for the particular product or in response to particular types of messages or communications vehicles. Nothing could be further from the truth.

Evidence from multiple disciplines, including neuroscience, psychology and marketing research shows that emotional response plays a central role in decision-making. Even emotions such as indifferent or stoic provide insight into what is going on with a consumer. Understanding the character and nature of emotions and efficiently measuring emotional response is a key component to effectively leveraging the insights within a marketing context.

As the importance of measuring emotional reactions in many different marketing contexts becomes more and more apparent, researchers seek an effective and useful scale that captures the full dimensionality of emotions. Some have attempted to devise checklists of emotions that consumers experience when they encounter brands, communications or other marketing touchpoints (Aaker, Stayman and Vezina, 1988; Zeitlin and Westwood, 1986). However, it is difficult, if not impossible, to create an exhaustive list of the full spectrum of emotions that products and marketing strategies generate. Furthermore, the large number of emotions or emotion clusters on these lists makes them unwieldy for research purposes (Nabi, 2010). In our view, a three-dimensional nonverbal measure offers a simple, reliable means of capturing the complexity of emotional responses and yields robust insights.

Completes the understanding

It is clear that determining how someone feels when you know what they are thinking about completes the understanding of behavior. This feeling, although complex, is best and most easily understood by segmenting it into the three key determinants: appeal, engagement and empowerment. Marketers who incorporate emotional response as a key measure can unlock a more complete understanding of what goes on in both the hearts and minds of consumers.

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Names of Note

In Memoriam...

■ **John Gongos**, founder and CEO of *Gongos Research*, Auburn Hills, Mich., died in July at age 51.

■ **Eric McDowell**, founder and partner of *The McDowell Group*, a Juneau, Alaska, research company, died in August at age 69.

■ *Cardinal Brands Inc.*, a Lawrence, Kan., manufacturing company, has named **Dan Bayha** marketing research coordinator.

■ *General Mills*, Minneapolis, has named **Jeanine Bassett** vice president, global consumer insights.

■ *Sawtooth Software*, an Orem, Utah, research software company, has hired **Keith Chrzan** as senior vice president, Sawtooth analytics.

■ **Debra Delman** has been appointed executive vice president, finance, and CFO of *Arbitron Inc.*, a Columbia, Md., research company.

■ **Paul W. Allen** has been hired as executive vice president, research and development, of *Olson Research Group Inc.*, Yardley, Pa. The company has also promoted **Miina Rafinski** to director, client services.

■ Encino, Calif., research company *uSamp* has hired **Leslie Warshaw** as vice president, research solutions. The company has also appointed **Alan Gould** and **Sean Moriarty** to its board of directors.

quirks.com/articles
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■ **Andrew Somosi** has been named CEO of *NM Incite*, a New York research company.

■ New York research company *StrategyOne* has named **Fergus Clarke** head of its Middle East and North Africa research division. Clarke will be based in Abu Dhabi, United Arab Emirates.

■ *Hall & Partners*, a New York research company, has hired **Andy Chappin** as global CFO. Chappin will be based in London. Additionally, Hall & Partners has promoted **Caroline Dukes** to managing partner, London; and **Joann Schaumann** to managing partner, New York.

Chappin

Dukes

Schaumann

■ *InSites Consulting*, a Ghent, Belgium, research company, has named **Robert Dossin** managing director, U.K.

■ Stockholm, Sweden, research company *Cint* has appointed **John Knoop** and **Teodora Puleva** to its Team Engage division; **Vladislav Mickevic** and **Rutger Klasens** to its Team Access division; **Christian Svärd** to its Team Core division; and **Stefan Törnblom** as an IT support specialist for the company's U.K. team.

■ *The Research Partnership*, London, has made the following appointments: **Vicky McLellan**, associate director, quantitative; **Karen Swords**, director, quantitative; **Anna Spivack**, research executive, quantitative; **Katie Watts**, **Anna March Garcia** and **Jekamohan Vicneswararajah**, research executive; and **Harrison Gaiger**, marketing executive. In its Singapore office, **Pei Li Teh** and **Paul Reed** have been promoted to associate director.

McLellan

■ **Tony Cosentino** has joined *Ventana Research*, San Ramon, Calif., as vice president and research director, business intelligence.

■ *GMO Research/Japan Market Intelligence*, Tokyo, has appointed **Sarah Jang** as senior director, business development, North America.

Jang

■ *Discovery Research Group*, London, has promoted **Colin Rice** to research director and **Jessica Francis** to research consultant.

■ **Thomas A. Louis** has joined the *U.S. Census Bureau*, Washington, D.C., as associate director, research and methodology, and chief scientist.

■ **Guy Garcia** has been named president, new mainstream initiatives, of Dallas research company *EthniFacts LLC*.

■ New York research company *Trendrr.TV* has hired **Meghann Sills Elrhoul** as vice president, client services and analytics.

■ Hollywood, Calif., research company *Fizziology* has appointed **Carter Weiss** to its advisory committee and named **Greg**

Buell director, West Coast sales.

■ **Michele Chang-McGrath** has been hired as head of research at London marketing and technology agency *LBi*.

■ *Vision Critical*, a Vancouver, B.C., research company, has named **Bruce Friend** president, media and entertainment. Separately, **Frank Kleinert** has joined the management team of Vision Critical's operation in Cologne, Germany.

■ Norwalk, Conn., research company *Bell, Falla and Associates LLC* has hired **Jeffrey Nelson** as senior director.

Nelson

■ **Emma Gilding** has joined McLean, Va., marketing company *Gannett Co. Inc.* as vice president, brand research and strategy.

■ New York research company *Ipsos InnoQuest* has appointed **David Lansanah** as global managing director, MarketQuest. Lansanah will be based in Singapore.

■ Lexington, Mass., research company *Forbes Consulting Group* has hired **Dan O'Toole** as director, business development, consumer packaged goods; and **Daniel Krason** as director, business development, financial services.

■ **Ashley Goode** has joined Norcross, Ga., research company *Marketing Workshop* as research manager.

■ New York broadcast television association *TVB* has named **Stacey Lynn Schulman** senior vice president, chief research officer.

■ *The American Marketing Association* (AMA), Chicago, has appointed **Sherrie Binke** of *ORC International* to its Market Research Council. Separately, **Lisa Gudding** of *GfK* has been elected to the AMA's international board of directors.

■ *ORC International*, a Princeton, N.J., research company has made the following appointments: **Susan Baron**, senior vice president, consumer; **Eve Oster**, vice president, consumer; **Kris Klein**, vice president, health care; and **Laurie Gelb**, vice president, public and civic services. Baron, Oster and Klein will be based in New York. Gelb will be based in Seattle.

■ Milwaukee research company *Market Probe* has named **Jill Rogers** vice president, agriculture and animal health.

Rogers

■ **Brian Smith** has been named vice president, client services, of *The Connell Group*, an Upper Saddle River, N.J., research company.

■ Iselin, N.J., research company *Schlesinger Associates* has appointed **Debby Schlesinger-Hellman** as executive vice president, U.S. qualitative solutions. Additionally, **Jacki Spear** has joined the company as vice president, client development.

■ *M3 Global Research*, Washington, D.C., has hired **Bill Russo** as president, market research; and **David Deutsch** as head of syndicated products.

■ **Patrick Monteleone** has been named research director of St. Louis research company *GroupM Next*.

■ *Polaris Marketing Research Inc.*, Atlanta, has hired **Joseph R. McGahan** as vice president, account development.

■ **Darren George** has joined *Radius Global Market Research*, New York, as research director, Europe, Middle East and Africa. George will be based in London.

■ *P&K Research*, Chicago, has hired **Mary Beth Lake** and **Paul Holtzman** as senior vice president.

■ New York research company *Insight Strategy Group* has promoted **Ally Aleman** to senior manager and **Nathan Cooper** to quantitative analyst.

■ **Warren Frankel** has joined New York research company *Ipsos Observer* as president, North America.

■ Boston research company *Lippincott* has hired **Dylan Stuart** as a partner in its London office and **Tim Cunningham** as a senior partner in its San Francisco office.

■ *Ipsos Healthcare*, New York, has named **Richard Clarke** director, global business development, syndicated services.

Clarke

■ *Koski Research Inc.*, San Francisco, has hired **Adela Pedroza** as research director.

■ **Mike Ludy** and **Bob Sweeney** have joined *Marketing Research Services Inc.*, Cincinnati, as vice president, client services.

■ **Ian Murray** has been appointed director, Europe, of Auckland, New Zealand, research company *Information Tools Ltd*. Murray will be based in London. Additionally, the company has promoted **Patricio Pagani** to company director.

Murray

■ *J.D. Power and Associates*, a Westlake, Village, research company, has named **Mei Songlin** vice president and managing director, China; and **Jacob George** vice president and general manager, global automotive consulting. Both will be based J.D. Power China's headquarters in Shanghai.

■ **Larry Taman** has joined New York research company *GfK Media* as vice president, business development. Taman will be based in San Francisco.

■ *The Advertising Research Foundation*, New York, has elected six new board members: **Robert Atencio**, *Pfizer*; **Sigal Cordeiro**, *General Motors*; **Natasha Hritzuk**, *Microsoft Advertising*; **Joan Lewis**, *Procter & Gamble*; **Vipin Mayar**, *Fidelity Investments*; and **Patti Wakeling**, *Unilever*.

Research Industry News

News notes

■ Columbia, Md., research company **Arbitron Inc.** has received accreditation from the **Media Rating Council**, New York, for its Portable People Meter ratings service in five markets: Los Angeles; Baltimore; Tampa-St. Petersburg-Clearwater, Fla.; Riverside-San Bernardino, Calif.; and San Antonio.

■ **The Marketing Research Association** (MRA), Washington, D.C., has announced its support of the **Federal Communications Commission**'s (FCC) plan for a new federal do-not-call registry as a way to screen out emergency lines.

"The PSAP [public safety answering point] registry could help prevent researchers from inadvertently calling emergency lines with their auto-dialers and violating the law," says Howard Fienberg, MRA's director of government affairs. "We support the new registry and will work with the FCC to make it functional, efficient and affordable."

Acquisitions/transactions

■ Tokyo advertising and communications company **Dentsu Inc.** has agreed to buy **Aegis Group PLC**, London, for approximately $5 billion. Separately, Aegis Group has acquired London research company **Data2Decisions**.

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■ **TiVo**, Alviso, Calif., has acquired **TRA Inc.**, a New York research company.

■ **Science**, a Los Angeles technology company, has acquired **Pinpuff**, a Los Angeles company that measures and tracks the influence of Pinterest users.

■ Fairfield, Conn., research company **Kantar** has acquired a majority stake in **Press Index S.A.**, a Boulogne-Billancourt, France, European press monitoring company.

■ Kansas City, Mo., research company **Service Management Group** has acquired Boston research company **Locately**.

■ **McCann Health**, a New York communications company, has acquired London research company **Double Helix**.

■ New York research company **WorldOne** has acquired **Sermo**, an online community of U.S. physicians.

■ **The GfK Group**, a Nuremberg, Germany, research company, has acquired the remaining 40 percent shares in German research firms **SirValUse Consulting** and **nurago**. The companies will be known as GfK nurago and GfK SirValUse Consulting and be incorporated into the GfK Digital Market Intelligence and user experience offer.

■ Rotterdam, Netherlands, research company **MetrixLab** has acquired **MarketTools Research Solutions Inc.**, San Francisco.

■ New York researcher **The Nielsen Company** has acquired **Vizu**, a San Francisco technology company.

■ London publishing group **Centaur Media PLC** has agreed to acquire London research company **Econsultancy**.

Alliances/strategic partnerships

■ **Annik Technology Services**, a Haryana, India, research company, has partnered with McLean, Va., mobile marketing company **Mobile Posse** to provide brands and researchers access to consumers who have opted in to receive studies on their phone's home screen via Mobile Posse's software.

■ **Arbitron Mobile Oy**, a division of Columbia, Md., research company **Arbitron Inc.**, and **iResearch Consulting**, Shanghai, China, have partnered to operate a mobile media research service in China. The service is based on an opt-in panel of approximately 10,000 people in China who would install an on-device software meter onto their smartphones and tablets.

■ Research companies **iTVX**, New Rochelle, N.Y., and **Rentrak Corporation**, Portland, Ore., have announced an initiative to integrate Rentrak's TV Essentials TV audience measurement with iTVX's Branded Engagement metrics.

■ State College, Pa., research company **VideoMining Corporation** has formed a strategic alliance with **Willard Bishop**, a Barrington, Ill., consulting firm, to combine their research capabilities to enhance the sales performance of product categories in the center store of supermarkets.

■ **M/A/R/C Research**, Irving, Texas, has partnered with the **Michigan State University** (MSU) Master of Science in Marketing Research (MSMR) graduate degree program. **Scott Waller**, vice president of M/A/R/C Research, has joined the MSU MSMR advisory board as the company's representative.

■ Research companies **The Search Monitor**, Orlando, Fla., and **comScore Inc.**, Reston, Va., have collaborated to combine data into a research offering for SEM and SEO marketers, dubbed Lighthouse.

Awards/rankings

■ **The Marketing Research Association**, Washington, D.C., has awarded **Ed Sugar** of Bartlesville, Okla., research company OLC Global with the Meritorious Service to Marketing Research Award for having demonstrated tremendous leadership, dedication and commitment to the marketing research profession.

■ **The Parlin Board of Governors**, as an entity of the American Marketing Association and the American Marketing Association Foundation, Chicago, has named **Greg M. Allenby** of the Fisher College of Business at Ohio State University, Columbus, the recipient of the 2012 Charles Coolidge Parlin Marketing Research Award. The award recognizes Allenby's contributions and dedication to the ongoing advancement of marketing research practice.

■ Stamford, Conn., research company **InsightExpress** has announced the winners of the 2012 InsightExpress Awards for excellence in advertising effectiveness, which honor brands, agencies and publishers that have created and delivered campaigns that were exceptionally successful at positively influencing a client's business and delivering measurable results. **Healthy Choice** was named the overall winner, along with winners **Blue Moon Brewing Company**, **Walgreens**, **MD Anderson Cancer Center** and **Macy's**.

■ **The Market Research Council**, New York, has inducted **Julian Baim** of New York research company GfK MRI into its Hall of Fame for his contributions to newspaper, magazine, digital and advertising research.

■ ***The Philadelphia Business Journal*** has named Bala Cynwyd, Pa., research company **Group Dynamics In Focus Inc.** one of the top 100 women-owned businesses in Philadelphia.

■ **The European Pharmaceutical Market Research Association** has awarded **John Branston** of The Research Partnership, London, and **Martin Lange** of Merck Serono the Jack Hayhurst Award for Best Paper for their work, "Rx Rationale: Physician Research via an iPhone App."

■ **Alison White** of Face Facts Research, Leeds, U.K., has been recognized as one of ***Management Today***'s top 35 Women Under 35.

■ **Tim Keiningham** of Ipsos Loyalty; **Lerzan Aksoy** of Fordham University; **Bart Lariviere** of Ghent University; **Sunil Mithas** of the University of Maryland; **Forrest Morgeson** of American Customer Satisfaction Index; and **Atakan Yalcin** of Koc University have received the award for Best Practitioner Presentation at the **Frontiers in Service Conference** in June for their work, "The Satisfaction, Repurchase Intentions and Shareholder Value Linkage: A Longitudinal Examination of Fixed and Firm-Specific Effects."

■ **MarketVision Research**, Cincinnati, has been named to the ***Cincinnati Enquirer***'s list of Best Places to Work.

New accounts/projects

■ Chicago research company **SymphonyIRI Group Inc.** has added **BP** and **Murphy Oil** to its AllScan Convenience Store Tracking Service.

■ **CMI Research**, Atlanta, has selected Wilton, Conn., research company **Toluna** as its online community and panel solutions provider.

■ **Synapse Research**, New York, has adopted Westport, Conn., research company **Imperium**'s RelevantID digital fingerprinting technology.

■ **L'Oréal USA**, New York, has chosen Reston, Va., research company **Clarabridge** to manage its social media data as part of its The Voice of Beauty project.

■ St. Louis research company **GroupM Next** has selected Philadelphia marketing company **Curalate** to provide clients of GroupM media agencies with engagement analytics on the social platform Pinterest.

■ New York researcher **The Nielsen Company** has launched the **Nielsen Innovation Lab**, a program designed to spur ideas and advancements in advertising effectiveness.

Additionally, **Simulmedia**, a New York advertising company, has expanded its relationship with New York researchers **The Nielsen Company** and **GfK MRI** to license several research products, including Nielsen's National All Minute Respondent Level television ratings data and Nielsen TV/GfK MRI Data Fusion.

■ Research companies **Medimix**, Miami; **Toluna**, Wilton, Conn.; and **UniversalSurvey** (SurveyHealthCare), New York, have joined **The Trust Alliance**, a London not-for-profit organization intended to advance health care data collection standards; develop and promote best practices; and foster trust in online physician research.

■ New York research company **EyeTrackShop** has selected Mumbai, India, research company **Majestic MRSS** to distribute and sell EyeTrackShop's services throughout Asia and the Middle East.

■ Chicago research company **VivaKi Nerve Center** has adopted Reston, Va., research company **comScore Inc.**'s validated Campaign Essentials Audience On Demand offering.

■ State College, Pa., research company **VideoMining Corporation** has added 10 convenience store retailers to its C-Store Shopper Insights program: **Circle K**, **AM/PM** (BP), **Chevron**, **Hess**, **RaceTrac**, **Cumberland Farms**, **Thornton's**, **Maverik**, **Holiday** and **GetGo** (Giant Eagle).

■ **The Coalition for Innovative Media Measurement**, New York, has selected San Francisco research company **Symphony Advanced Media** (SAM) to pilot test approaches to cross-platform advertising effectiveness by linking passive measurement of actual advertising exposure to consumer response data. SAM will collect data from its Media Insiders Panel.

■ Buenos Aires, Argentina, research company **DatosClaros** has adopted New York research company **OnePoint Global**'s mobile survey platform.

■ Shelton, Conn., research company **SSI** has been selected by Ghent, Belgium, research company **InSites Consulting** to provide sample and data collection for a study across managers in six countries to explore their companies' social media habits.

■ San Marino, Calif., research company **DB5** has selected Boston research company **Crimson Hexagon**'s ForSight platform to expand its social media analysis.

■ **The Duke-Ipsos Research Center**, New York, has added Pleasanton, Calif., grocery chain **Safeway Inc**. and Dallas consumer packaged-goods company **Kimberly-Clark** to its advisory board. The purpose of the Center is to advance the knowledge of participating members through a better understanding of the decision theory associated with creating demand generation through the shopping experience.

New companies/new divisions/ relocations/expansions

■ **Research Now**, Plano, Texas, has rebranded **iPinion**, a Columbus, Ohio, research company it acquired in May, as **Research Now Mobile**.

■ Nuremberg, Germany, research company **The GfK Group** has created Digital Market Intelligence (DMI), a global practice to help companies understand their return on digital marketing and advertising investments. DMI will incorporate the capabilities of KN Dimestore and nurago, both recently acquired by GfK.

■ **ABI Research**, Oyster Bay, N.Y., has opened a research and forecasting facility in Wellingborough, U.K.

■ Tokyo research company **AIP Corporation** has opened an office in Singapore.

■ **Maritz Europe**, a division of Maritz Research, St. Louis, has established a business services division.

■ Boston research company **Communispace** has opened an office in Shanghai, China. As part of its expansion, Communispace will partner with Shanghai research company **Jigsaw International**.

■ Needham, Mass., research company **Visual IQ** has opened a London office that will serve as the company's European headquarters.

■ **FourthWall Media**, Dulles, Va., has launched a research division called **MassiveData**, designed to combine television viewing data with data mining technologies to produce audience analytics for television.

■ Las Vegas research company **Precision Opinion** has announced plans to add 200 employees in Las Vegas and other locations in Nevada.

■ Livonia, Mich., research company **Market Strategies International** has launched a qualitative insight boutique. The group will be led by Steve Wolf.

■ **Third Eye Market Research Inc.**, a Toronto company focused on Canadian ethnic target groups, has opened its doors at 37 Bulwer Street. The company is online at www.thirdeyemarket-research.com. Gautam Nath will serve as managing director.

■ Elkins Park, Pa., language services company **CETRA Language Solutions** has opened a facility in San Diego at 2534 State Street.

■ **Perception Research Services International**, Fort Lee, N.J., has opened an office in Rome.

■ **Sands Research**, El Paso, Texas, has moved its headquarters to Los Angeles. The company will maintain its manufacturing facility in El Paso.

■ **Taylor Research**, San Diego, has moved its offices to 6602 Convoy Court, Suite 210, San Diego.

■ **Research Panel Asia**, Tokyo, has relocated its U.S. headquarters from Los Angeles to Constellation Place in Century City, Calif.

■ Adam Weinstein and Nathan Lynch have launched **Synapse Research Inc.** in New York, with offices in Connecticut and Maryland. The company is online at www.synapseresearch.com.

■ **Bhagyam Market Research** has opened for business in India. The company is online at www.bhagyam-marketresearch.com.

■ **Food Insights**, Chicago, has re-branded as **Research Between the Lines**. The company is online at www.researchbetweenthelines.com.

■ Andrew Johnson and Catherine Read-Fletcher have opened **Beyond Insights**, a South Africa research company. The company is online at www.beyondinsights.co.za.

Research company earnings/ financial news

■ **ComScore Inc.**, Reston, Va., reported revenue of $60.3 million for the second quarter of 2012, an increase of 4 percent over second-quarter 2011.

■ **Harris Interactive Inc.**, Rochester, N.Y., reported revenue of $36.5 million for fourth-quarter 2012, compared to $44.2 million in the same quarter in 2011. Full-year 2012 revenue was $147.5 million, down from $160.7 million in 2011.

■ **The Nielsen Company**, New York, reported second-quarter 2012 revenues of $1,385 million, up 4 percent in constant currency. Net income for the quarter increased to $103 million from $69 million in 2011.

■ **Ipsos**, Paris, generated revenues of 837 million euros in the first half of 2012, an increase of nearly 50 percent over the first half of 2011. In the second quarter of 2012, revenues increased 53.4 percent.

■ **The Mobile Marketing Association**, New York, has secured over $1 million in funding for research to launch SmoX.me (Smart Mobile Cross Marketing Effectiveness), a global in-market research project to evaluate the return on investment that mobile contributes to the marketing mix.

■ **Verve**, London, closed a £0.75 million expansion capital fundraising.

■ **NetBase**, Mountain View, Calif., announced an $18.1 million expansion round from Thomvest Ventures, Redwood City, Calif.; Altos Ventures, Menlo Park, Calif.; and Tran Ventures, New Orleans, among others.

■ **Visual IQ**, Needham, Mass., received $12 million in funding from Volition Capital, Boston, and Fog City Capital, San Francisco.

■ **Affectiva**, Waltham, Mass., raised $12 million in Series C financing, backed by Horizons Ventures, Hong Kong, and Kleiner Perkins Caufield and Byers (KPCB) Digital Growth Fund, Menlo Park, Calif., with participation from existing investors. As a part of the financing, Frank Meehan at Horizons Ventures will join Affectiva's board of directors and Mary Meeker, a partner at KPCB, will join as an Affectiva board observer.

CALENDAR OF EVENTS

••• can't-miss activities

The Pharmaceutical Marketing Research Group will hold its annual meeting of The PMRG Institute, themed "Getting Ahead of the Curve – Advancing the Marketing Researcher," on October 14-16 at the Sheraton Philadelphia Downtown Hotel in Philadelphia. For more information visit www.pmrg.org.

The 2012 **Ethnographic Praxis in Industry Conference,** themed "Renewal," will be held on October 14-17 at the Savannah College of Art and Design in Savannah, Ga. For more information visit www.epiconference.com/2012.

featured

Anderson, Niebuhr & Associates will host its workshop, themed "Questionnaire Design and Use," on October 18-19 at the Radisson Plaza Hotel in Minneapolis. For more information visit www.ana-inc.com/workshops/questionnaire.html.

Research & Results will hold its annual conference on October 24-25 at the MOC Convention Center in Munich, Germany. For more information visit www.research-results.com/trade-show/exhibitor-information.

IIR will hold its international shopper insights in action event on October 24-26 at the Hilton Amsterdam in the Netherlands. Save 20 percent off the standard rates with code SHOP12QUIRKS. For more information visit www.iirusa.com/insightsintl.

The ARF will hold its 2012 ARF Industry Leader Forum, themed "Leading Insights Into the Future: Tools for Transformation," on October 30 at the Time-Life Building in New York. For more information visit www.thearf.org/assets/ilf-2012.

ESOMAR will hold its 3D digital dimensions conference, themed "(Online + Social Media + Mobile) Research," on November 4-6 in Amsterdam, the Netherlands. For more information visit www.esomar.org.

ESOMAR will hold its qualitative research conference, themed "Informing Strategic Decision Making and Action," on November 6-8 in Amsterdam, the Netherlands. For more information visit www.esomar.org.

IIR will hold its annual conference, "The Market Research Event 2012," on November 12-14 at the Boca Raton Resort and Club in Boca Raton, Fla. For more information visit www.themarketresearchevent.com.

Strategic Solutions will hold a conference, themed "Social, Local and Mobile Market Research Innovations Congress," on December 4-5 in San Francisco. For more information visit www.marketresearchinnovations.com.

The International Quality and Productivity Center will hold its annual CMO Exchange conference, themed "Transcending Technology and Championing Marketing Innovation in a Digital World," on January 27-29 in Miami. For more information visit http://www.cmo-exchangeusa.com/Event.aspx?id=790850&CMOE_MP_Quirks.

The Mobile Marketing Research Association will hold its general assembly, themed "Shaping the Future of Mobile Marketing Research," on January 31 in Kuala Lumpur, Malaysia. For more information visit www.mmra-global.org.

The Marketing Research Association will hold its annual CEO summit on February 25-27 at the Fairmont Turnberry Isle in Miami. For more information visit www.marketingresearch.org/summit.

The Council of American Survey Research Organizations will hold its annual online research conference on March 7-8 at the Westin San Francisco. For more information visit www.casro.org.

The Pharmaceutical Marketing Research Group will hold its annual national conference on March 10-12 at Gaylord National in National Harbor, Maryland. For more information visit www.pmrg.org.

Worldwide Business Research will hold a conference, themed "Next Generation Customer Experience," on March 11-13 at the Rancho Bernardo Inn in San Diego. For more information visit www.the-customer.com.

The Advertising Research Foundation will hold its annual Re:think convention and insights zone on March 17-20 at the New York Marriott Marquis in Times Square. For more information visit www.thearf.org/rethink-2013.php.

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.

CORRECTION

Due to an editing error in "There's the beef" on page 26 of the August issue, the article's second paragraph was duplicated. To access a corrected version, please visit www.quirks.com/articles/2012/20120806.aspx.

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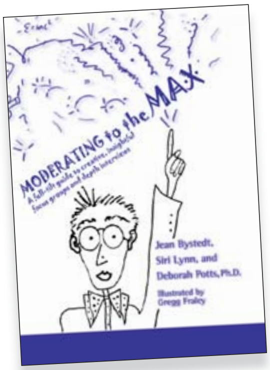

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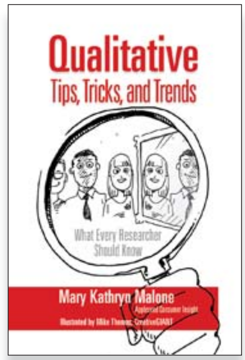

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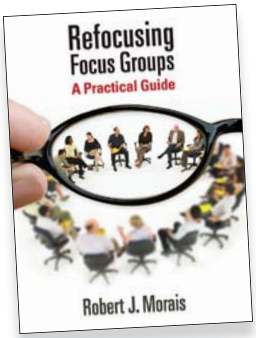

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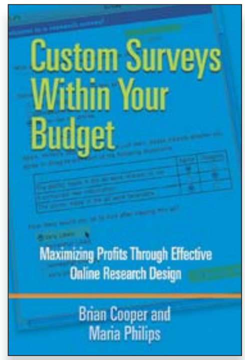

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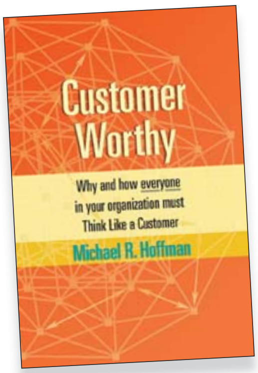

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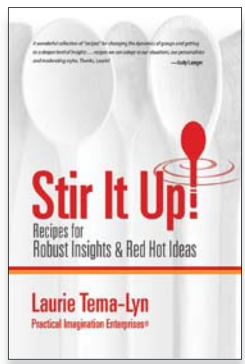

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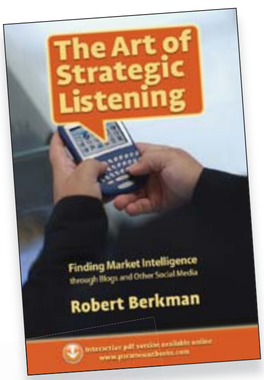

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BEFORE YOU GO ••• issue highlights and parting words

••• cover-to-cover

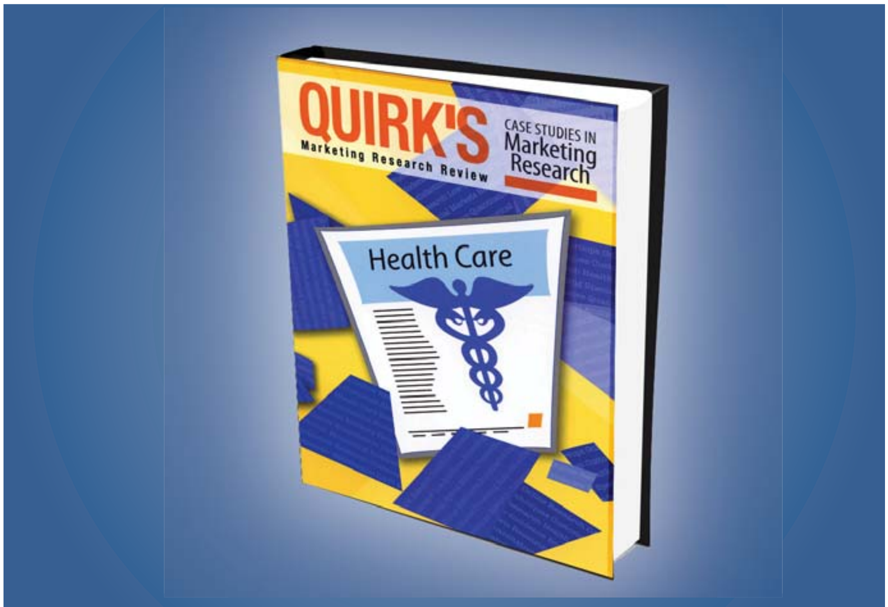
Facts, figures and insights from this month's issue

page 14
Many Asian-Americans continue to feel a degree of cultural separation from other Americans.

page 32
The research manifested patients' needs for information, empowerment and support.

page 41
Many national food companies have realized that gluten-free is not a fad but rather a lifestyle.

page 54
Each doctor had an enduring self-concept that defined their role in the lives of patients.



Quirk's publishes its first book!

After 26 years as the go-to resource for research professionals in all industries via our monthly magazine, Quirk's has diversified! We've partnered with Paramount Books to publish *Case Studies in Marketing Research: Health Care*. Drawn from the pages *Quirk's Marketing Research Review*, the book offers real-world examples of how organizations spanning the health care realm – from hospitals and clinics to hearing-aid makers – have turned to marketing research to answer critical business questions.

The book answers questions like: How satisfied are public employees with their health plans? How can a hospital expand its market share? What fears about treatment should a new series of commercials address?

To purchase a copy of your own, visit www.paramountbooks.com.

TODAY

Did you see us on the Today Show?

In August, Quirk's was mentioned on NBC's Today Show! Although they didn't get what we do quite right, we were flattered nonetheless and our Web traffic rose by over 25,000 visits in the hours after the mention. As of press time we are working with a contributing editor of the show on another segment – so stay tuned!

WIN ••• WIN ••• WIN ••• WIN ••• WIN

QUIRK'S
Marketing Research Review

A free copy of *Case Studies in Marketing Research: Health Care*!

Three winners will be selected to receive a copy of *Case Studies in Marketing Research: Health Care*, a compilation of past *Quirk's Marketing Research Review* articles on various topics related to the health care industry. Learn how hospitals, clinics, pharmaceutical companies and even hearing-aid makers have relied on marketing research to deliver insight!

For more information visit www.paramountbooks.com.

To enter, visit www.quirks.com/contest.aspx or send an e-mail to contest@quirks.com with your complete contact information. Please include "Book Contest" in the subject line. Deadline to enter is October 31, 2012. The winner will be selected at random and announced in the December issue of *Quirk's*.

Congratulations to July's winner, Sarah Ehlinger of The Principal Financial Group, Des Moines, Iowa, and August's winner, Danielle Shnider of New England Biolabs, Ipswich, Mass. July's prize was free registration to the Corporate Researchers Conference and August's prize was a free customer satisfaction survey from QuestBack!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