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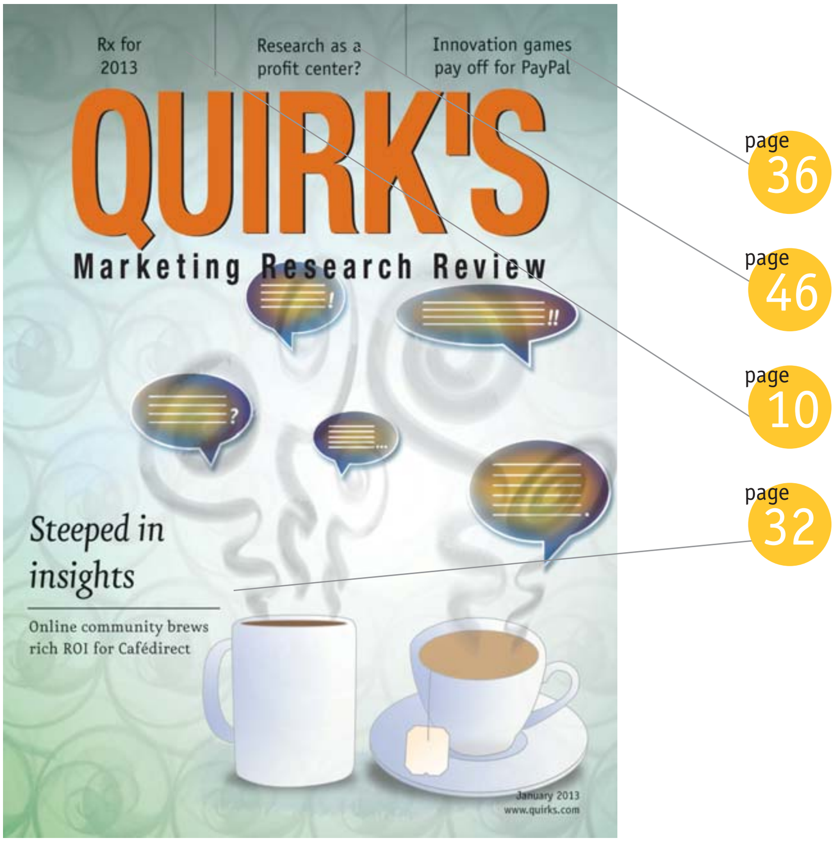

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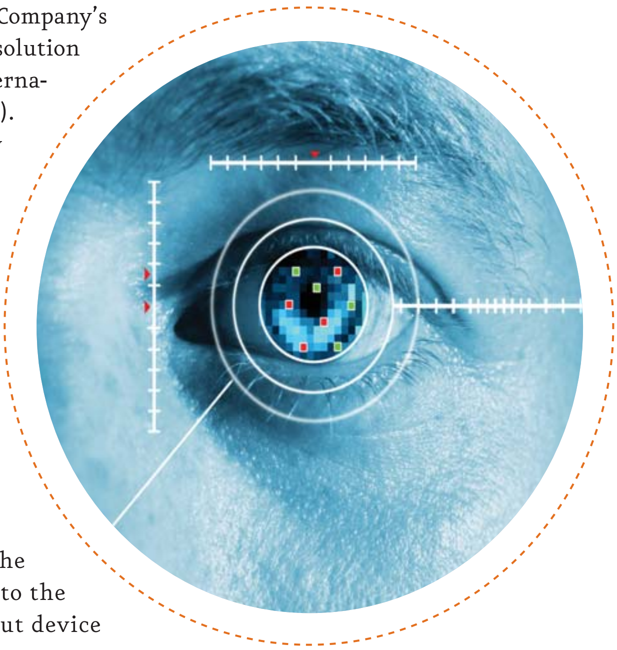
••• eye tracking

Eye-tracking technology adopted by non-research client

Marketing research – with all its tools and techniques – is an impressive thing and its applications can span far beyond consumer surveys and Webcam interviews. In fact, some marketing research companies may be able to expand their clientele beyond traditional buyers of research by thinking outside the box and devising innovative, non-research uses for their offerings.

SensoMotoric Instruments GmbH (SMI), a Berlin research company, has integrated its remote eye-tracking technology into Prentke Romich Company's (PRC) Accent platform, a solution for augmentative and alternative communication (AAC). AAC technology is used by those with a wide range of speech and language impairments and ranges from manual sign language to speech synthesis with microcomputers.



PRC recently released the NuEye Tracking System, an eye-gaze accessory for the company's Accent 1200 device. Attaching the NuEye Tracking System to the Accent 1200 speech output device is intended to allow users to operate the communication device's capabilities using just their eyes.

SMI's eye-tracking technology is powering the NuEye, which automatically determines optimal single- or double-eye tracking strategies based on user capabilities. The device also accommodates eyeglasses and contact lenses. Various calibration options support increased accuracy as the user's eye control capabilities improve. NuEye is designed to work completely contact-free and a large trackbox area accommodates a wide range of user head movement. NuEye users can "select" keys by gazing for a specified period of time to generate speech, allowing the disabled to send e-mails, browse the Internet, post on social networking sites and more.

quirks.com/articles ID 20130101

••• mobile research

Who's in favor of app ratings? E for everyone

In 2012, CTIA - The Wireless Association and the Entertainment Software Rating Board, together with six founding mobile app storefronts and numerous developers, created a maturity rating system for mobile apps, though not all storefronts require a rating for an app to be approved for distribution. While Apple and Google resisted the industry-wide movement, consumers – especially parents – support a prominent and streamlined rating system.

Much like there are ratings systems for movies, music, video games and TV shows, consumers are in favor of a rating system for apps, according to the results of a poll by SodaHead.com, an Encino, Calif., opinion-based community.

Overall, 77 percent of the more than 1,100 poll respondents are in favor of a rating system. In addition, 90 percent of parents polled believe a parental rating system for apps should be implemented. The desire to rate apps even extends to young respondents, as 58 percent of those ages 13-to-17 and 75 percent of those ages 18-to-24 believe a rating system or age restriction should be introduced.

Eighty-eight percent of respondents ages 45-to-54 were in favor of a parental rating system, as were 87 percent of those ages 55+. Respondents ages 25-to-44 were 78 percent in favor.

Trade Talk

By Joseph Rydholm, Quirk's Editor

Rx for a new year

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Joe Rydholm can be reached at joe@quirks.com

The new year is upon us and perhaps as at no time in recent memory, it feels like marketing research is on the cusp. The cusp of what? That's the problem: I'm not sure.

We're all familiar with the big issues facing our industry. They include:

Obsolescence via DIY research tools and the rise of big data. Who needs researchers when I can send out my own surveys as often as I want and do it for free? Why commission ad hoc projects when I can just scrape the Web?

Obsolescence via Google Consumer Surveys. See above and add "for a small fee" and "two questions at a time."

Obsolescence via Google and Facebook. Two giant entities with equally giant development budgets. They're both already dabbling in research. Why do I sometimes feel like they're working on the killer app that will put the nail in our coffin?

Obsolescence via the big consulting firms. Their words somehow command more respect from the C-suite than the MR function and they often seem to do what we do better than we do it. How did that happen?

Long-time readers will know that I'm optimist by nature and while the above threats are certainly present and real, I don't truly believe they'll be the end of marketing research as we know it. I've heard and seen too many examples of creative, motivated and enthusiastic people who are doing their best to keep the insights-gathering function relevant and top-of-mind with important internal audiences.

What are some of things that they do that you should be doing too?

Step outside your comfort zone. Researchers can't afford to embody the stereotype of the passive, data-gathering number-cruncher anymore (if they ever could!). They need to be driving the research process and discussions that surround it. Insights should be delivered, not just offered.

Improve your skill set. Take classes, read books, attend conferences. Arm yourself with new ideas and new capabilities so you can meet challenges head on rather than being surprised by them.

Read up on the competition. By competition, I mean the aforementioned Googles and Facebooks and giant consulting companies. Set up customized news alerts to stay on top of what they are doing. Read their press releases. Listen to their Webinars. What can you learn from them to beat them at their own game?

Put yourself in your customer's shoes. Beyond using the project requests you field from your internal customers as a barometer, try to understand the pressures they are feeling from their own internal groups. How can your insights function help ease their pain and make their lives easier? How can you package and deliver the information they need in the form that works best for them, not just for you?

Think different/get creative. Look outside the realms of research and your own specific industries for inspiration. What can you learn that might help you or your organization view or solve a problem in a new way? Are there long-standing practices or beliefs that are ripe for a re-think?

Do it for them. Is DIY research running rampant in your organization? Talk to the people sending out those surveys. Why are they doing so? In many cases you realistically won't be able to compete with their reasons but are there times when you can provide them a similar service through a fast, no-frills option?

A few minutes

I offer these ideas with the full knowledge that all of us are already busy beyond belief. I get that. So there's no need to tackle them all. Just try to carve out a few minutes here and there to take some forward steps. You'll be surprised how far you can get.

quirks.com/articles ID 20130102

IN FOCUS

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

// Survey Monitor

••• mobile research

Stores as showrooms

Mobile-equipped consumers view merchandise in stores, buy online

Seventy-two percent of consumers ages 20-to-40 in the U.S. and the U.K. use mobile devices while in-store to compare prices but the majority leave before making a purchase, according to a study by New York consulting firm Accenture Interactive. The research also showed that while consumers in this age group are concerned about online privacy, they will permit retailers to track their shopping behavior to personalize their shopping experience.

More than half of the 2,000 consumers surveyed in each country believe that in-store prices are higher than online prices. While 60 percent say that online prices entice them to visit a store where they can compare prices and view merchandise up close, 48 percent still go home to buy the products from that retailer online and another 32 percent buy products online from a different retailer. Only 20 percent make their final purchase in-store.

"The showrooming trend can pose a threat to retailers, given that nearly a third of our respondents make their final online purchases with other stores," says Baiju Shah, managing director, strategy and innovation, at Accenture Interactive. "But consumers don't want to shop online exclusively and our work with retailers shows that physical stores don't have to compete on price alone but rather focus on the whole experience. Retailers need to create a seamless, multichannel experience that blends the digital and physical and delivers convenience, price and relevance."

Consumers are extremely interested in having a more personalized shopping experience, despite their concern for privacy protection. Sixty-four percent say they would be receptive to receiving text messages when visiting a store informing them of offers that match their past shopping interests and 60 percent strongly agree that it is acceptable to receive advertisements on their smartphone if they opt into them.

Despite the fact that 86 percent of those surveyed say they are concerned about Web sites tracking their online shopping behavior, 85 percent are aware that such tracking goes on but they understand that tracking enables companies to present offers and content that matches their interests. Nearly half of the respondents are receptive to their favorite stores or brands using their tracking data to inform their future purchases and make them aware of product availability.

When asked to make a choice, 64 percent of respondents say it is more important that companies present them with relevant offers against only 36 percent who say companies should stop tracking their Web site activity. At the same time, however, 88 percent strongly agree or agree that companies should give them the flexibility to control how their personal information is used to tailor their shopping experience.

Ninety-two percent of respondents are more inclined to purchase from a company that makes use of social media channels. For 67 percent of the respondents, Facebook is the preferred social media channel. The survey also showed that 80 percent of consumers are more likely to buy from a company that uses online and e-mail communications and 70 percent are

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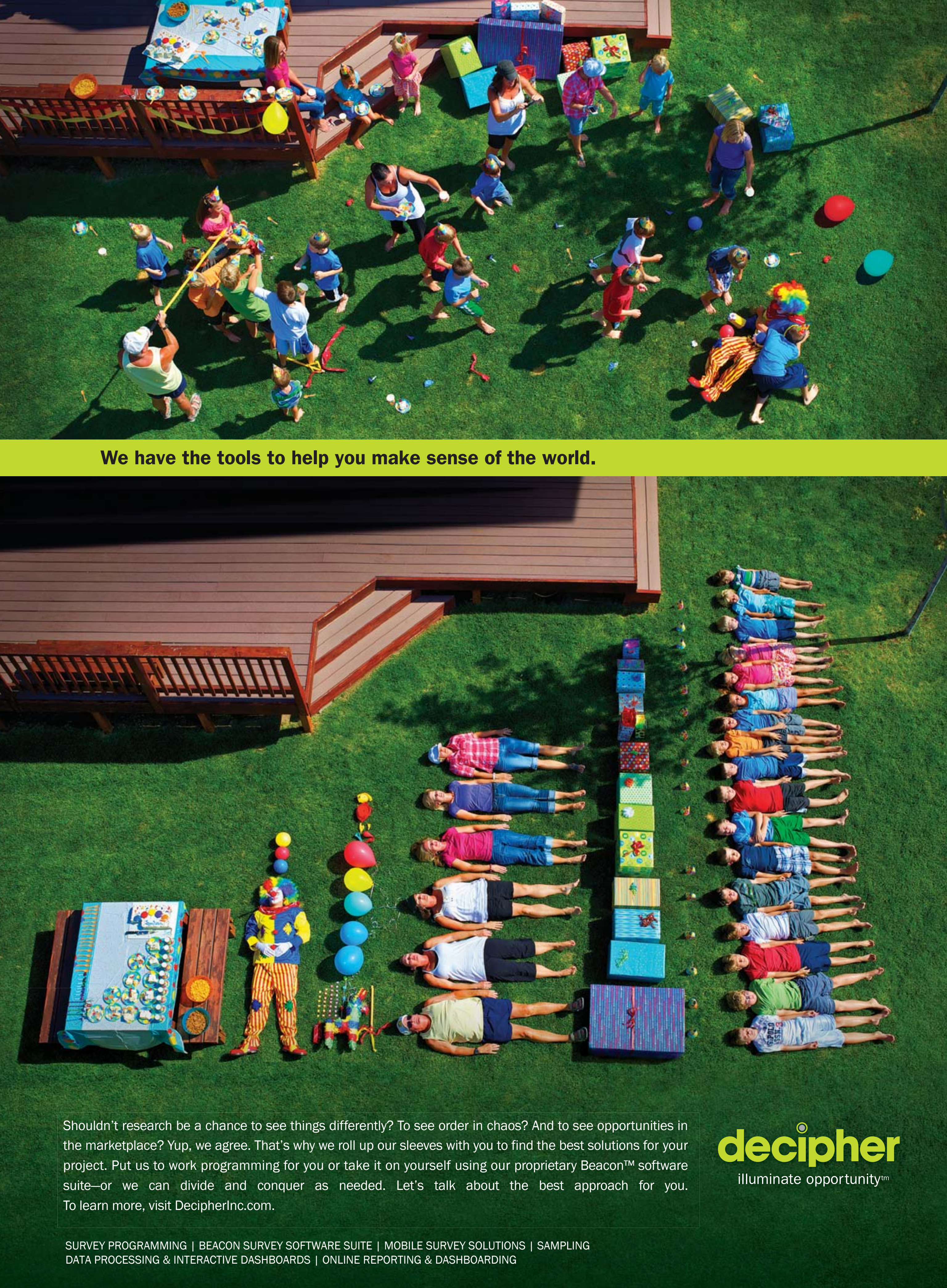
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more inclined to buy from companies using mobile applications.

Additionally, respondents selected Internet advertising as the channel most likely to steer them toward buying (47 percent), followed by radio advertising (45 percent), print (31 percent), mobile (19 percent) and television (15 percent).
www.accenture.com

••• non-profit research

The givingest cities

Salt Lake City and Midwest hubs lead in volunteer efforts

Over one-quarter of American adults have participated in volunteer work, volunteering programs or volunteering organizations in the past 12 months, according to a study conducted by Scarborough Research, New York. The study also looked at the top local markets, demographics and media consumption of the 27 percent of volunteering Americans.

While volunteers from all across the U.S. have contributed their time to relief efforts for varying crises, certain local markets are more saturated with volunteers than others. The top local markets for these do-gooders include Salt Lake City (42 percent); Minneapolis (34 percent); Des Moines, Iowa (34 percent); Portland, Ore. (34 percent); and Grand Rapids, Mich. (33 percent).

Although not every market has such robust volunteer numbers, even the bottom markets have large portions of their adult population doing their part: El Paso, Texas (21 percent); Bakersfield, Calif. (21 percent); Providence, R.I. (20 percent); Harlingen, Texas (20 percent); and Miami (20 percent).

So who are America's volunteers? The generational breakdown of volunteers is as follows: Millennials (20 percent of adults who participated in volunteer work in the past 12 months), Generation X (27 percent), Baby Boomers (34 percent) and the Silent Generation (18 percent). Volunteers display a sense of initiative in their professional lives. Adults who are self-employed or small business owners are 12 percent more likely than all U.S. adults to be volunteers. While 43 percent of volunteers are employed full-time, they are 16 percent more likely to hold white-collar employment and 34 percent more likely to have a college degree or higher.

Volunteers are not only generous with their time, they are financially charitable as well. Volunteers are 84 percent more likely than all U.S. adults to have contributed to an arts/cultural organization in the past 12 months; 61 percent more likely to donate to an environmental organization; and 60 percent more likely to contribute to a political or social care/welfare organization in the same time period. Fifty-seven percent of volunteers contributed to a religious organization in the past year.

How can you reach out to volunteers? Fifty-six percent of volunteers read the local news section of their newspaper and 38 percent read the international/national sections. Volunteers are 17 percent more likely than all U.S. adults to tune in to HGTV, 16 percent more likely to watch PBS and 13 percent more likely to watch TLC.
www.scarborough.com

••• financial research

The female retirement crisis

The twilight years prove worrisome for women

Most Americans, particularly women, are woefully underprepared for retirement, as four in 10 women have less than $10,000 saved and only 21 percent have more than $100,000 in all of their investment accounts, according to data from Chicago research company Mintel.

The situation is even more dire for pre-retirees. Some 58 percent of single women ages 45+ who have any kind of savings or retirement account have less than $50,000 saved, while only 22 percent have more than $100,000 saved. At the same time, these women are aware of their need to step up their savings efforts, as only 5 percent of 45-to-54-year-old women and 16 percent of 55-to-64-year-old women believe they are saving enough for their twilight years.

"Women nearing retirement age believe saving for retirement is very important and women aged 25-to-44 are the most likely to rate saving for retirement as their top financial goal over the next year," says Susan Menke, vice president and behavioral economist at Mintel. "While it may be too late for older women, research suggests that younger women are starting to save early and may not end up in the same predicament."

Thirty-six percent of women who aren't retired yet say they plan to keep

working at least part-time during retirement because they expect they will need the income. That number jumps to 50 percent for women who are 55-to-64 years old. Lack of retirement planning is evident in that only 13 percent of women who aren't retired say they have determined the age at which they will be able to do so.
www.mintel.com

••• apparel research

Tough customers

Millennials most unsatisfied with online apparel shopping

Satisfaction with online apparel retailers is significantly lower among online shoppers ages 18-to-24 than among those ages 55+, according to a study from Westlake Village, Calif., research company J.D. Power and Associates. Satisfaction among online shoppers ages 18-to-24 is 795 (on a 1,000-point scale), which is significantly lower than those ages 55+ who scored 825 and the report average of 812.

The report examines satisfaction with online apparel retailers among consumers who have completed an apparel purchase online in the past 12 months. Overall satisfaction is measured across seven factors (in order of importance): online store services and delivery; Web site/online store; usefulness of information; in-stock availability of merchandise; competitiveness of pricing; variety of merchandise offered; and contact with customer service. The relative importance of customer service is low, as only 18 percent of online consumers indicate that they contacted customer service. However, among those who contacted customer service, this becomes the most important factor.

According to findings from the report, younger consumers (18-to-24-year-olds) who shop online for apparel rely predominantly on price (63 percent) when selecting an apparel retailer. Notably, a significantly higher proportion of these young consumers use positive reviews of the brand (27 percent) and recommendations from family, friends or colleagues (19 percent) when selecting an online apparel retailer than the report average of 19 percent and 15 percent, respectively. Conversely, older consumers (ages 55+) who shop online for apparel use past experience with a brand (77 percent) as their primary reason for selecting a retailer, while only 16 percent use positive reviews of the brand and 11 percent use recommendations from family, friends or colleagues.

On an annual basis, consumers visit their primary online apparel retailer's Web site an average of 30 times and make an average of five purchases. Younger consumers visit their primary apparel retailer's Web site and purchase from that retailer online significantly more often, averaging 42 visits annually and seven purchases. Conversely, older consumers visit their primary online apparel retailer's Web site an average of 18 times and make an average of four purchases annually.
www.jdpower.com

••• children

An inverse relationship

Healthy eating grows in popularity as U.S. youth grow unhealthier

Today, nearly one-third of children are overweight, with 15 percent considered obese. This growing epidemic has prompted food companies to get involved by subjecting themselves to self-imposed marketing regulations and launching family-directed advertising and promotional initiatives. Kansas City, Mo., research company KidSay and Lombard, Ill., branding agency The Marketing Store Worldwide conducted qualitative and quantitative research among U.S. kids ages five-to-11 to understand kid eating behaviors and attitudes.

Generally, kids see themselves as healthy eaters. This is true across gender and age. Roughly two-thirds of tweens (ages eight-to-11) say they are excellent or pretty good when it comes to healthy eating. Very few kids say they are not very good. Moms agree, with more than 75 percent rating their kids' eating habits positively.

Eating healthy has become cool. Within the past decade, there's been a dramatic shift in kids' attitudes toward healthy eating. The vast majority (80 percent) now think it's cool, up significantly from 59 percent in 2004. Correspondingly, very few (5 percent) now view it as uncool, as opposed to 19 percent in 2004.

Unfortunately, most of kids' favorite foods are less healthy, with the exception of fruit. In fact, across a variety of questions about their favorite foods, the ratio of healthy to unhealthy foods tended to be 2:3 or lower.

Kids are confused about how healthy their food and beverages are. During focus groups, kids were asked to sort 43 products into three groups: healthy, not healthy and unsure. Kids had a clear understanding of some food categories as healthy or unhealthy (milk, water, fruits, vegetables) but many (including grains, proteins and kid foods) are less clear and nutritional education is not motivating for kids. Education alone will not be enough to stem the tide of childhood obesity.

Insights gleaned from the research point to three strategies that marketers can use to encourage healthier choices: nudge, camouflage and play.

The nudge strategy involves structuring kids' environments to make healthier foods/beverages more salient. The underlying premise is that kids tend to be attracted to and select items that are visually prominent or the ones that are most convenient. Grocery stores that position pre-sweetened cereals at a child's eye level and food manufacturers that package their products in vivid colors or with a cool promotion are using nudge. Fast-food restaurants that provide fruit as a default in their kids' meals are also using nudge.

The camouflage strategy usually involves hiding a healthy food (that kids don't like) within another food (that kids do like). Mixing spinach into a fruit smoothie or pureed carrots into spaghetti sauce are examples of camouflage. One retail product that has successfully leveraged this strategy has been V8's V-Fusion, which mixes vegetable juice in with fruit juice. Another variation involves coupling a disliked healthy food with another food or sauce that kids do like. One example is Earthbound Farm Organic Dippin' Doubles Carrots and Ranch Dip.

The play strategy involves bringing play into food. Kids are driven to play and look for opportunities to do so. Fruit Roll-Ups let kids play by unrolling it, twisting it or punching out shapes. String cheese lets kids pull it apart into pieces. Play can also be provided through the packaging, such as Go-Gurt.

www.globalkidsstudy.com

••• customer satisfaction

No. 1 with a bullet

Amazon earns highest satisfaction scores among online shoppers

According to a study from Rochester, N.Y., research company Harris Interactive of online shopper satisfaction and other factors for specific retailers from Best Buy to Walmart and more, Amazon outperformed the competition on all measures in 2012. Additionally, a majority of online U.S. adults are satisfied with the overall online shopping experience and all retailers tested received a rating of a five or higher on a seven-point scale. Also, all tested brands show positive recommendation likelihood scores.

The study examined 14 retailers across a number of topics, including the selection of products, ease of shopping, perceived value and likelihood to recommend, along with overall satisfaction ratings. For mass-merchandise Web sites, Amazon ranked highest overall, followed by Costco Wholesale, Target and Walmart. For department store Web sites, JCPenney and Kohl's tied for first, followed by Macy's and Nordstrom tied for second. In clothing and apparel, L.L. Bean and Victoria's Secret were ranked first, followed by Zappos, Gap, Abercrombie & Fitch and Urban Outfitters.

Costco Wholesale received high marks when it came to mass merchandisers seen as offering a good value. Zappos and L.L. Bean shared the top spot for selection of products in the clothing and apparel category and online shoppers rated Kohl's Web site highest for ease of shopping within the department category.

When asked which factor – value, selection or ease of shopping – is most important in determining return visits to an online retailer, the most-selected factor is good value for the money (33 percent) by a considerable margin over both ease of shopping (16 percent) and selection of products (10 percent), though the top response overall is not at all sure (41 percent).

Beyond Amazon, Costco was the second-highest ranked mass merchandiser for value, with Walmart and Target close behind. Kohl's was the top-ranked department store for perceived value and L.L. Bean and Zappos were the top-ranked clothing and apparel Web sites for the same.

On almost every measure for every retailer tested, positive ratings among women outpaced those of men. However, positive ratings of Victoria's Secret among men are roughly even with those of women for selection of products (75 percent men vs. 72 percent women) and likelihood to recommend to a friend or relative (73 percent men vs. 71 percent women).

Nordstrom, long known for its commitment to customer service and satisfaction, may have some ground to make up with online shoppers in 2013, as it didn't rank in the top 10 in terms of overall online customer satisfaction. Specialty retailer L.L. Bean ranked seven spots higher than Nordstrom on the customer satisfaction list. Other major retailers Kohl's and JCPenney also outperformed Nordstrom on this measure.

www.harrisinteractive.com

IN FOCUS

Product and Service Update

••• data analysis

Big data for the little people

Self-service platform to make big data more accessible

Data analysis companies Kognitio, New York, and NeutrinoBI, Birmingham, U.K., have partnered to release a solution designed to allow business end-users to engage in data discovery using natural language, powered by the in-memory Kognitio Analytical Platform. In addition, the companies will implement a complete business intelligence infrastructure, making it available on a self-service basis through Kognitio Cloud, implemented via Amazon Web Services.

The Kognitio-NeutrinoBI partnership is intended to democratize big data capabilities, allowing small and midsized firms, which have wanted the ability to perform in-depth business analytics on their data like those conducted by much larger companies, to accomplish these tasks with less time, money and technical experience.

NeutrinoBI enables users to perform Internet-like searches on structured data, using queries based on natural language. In addition to this freeform search capability, NeutrinoBI also aims to allow users to explore data associations and uncover information as needed. With the ability to create dynamic dashboards in minutes, these self-service insights can be shared to support day-to-day decision-making across teams and organizations.
www.kognitio.com

quirks.com/articles ID 20130104

••• diy research

Taking control

Beta tool helps owners manage Web site research

Usability Sciences, an Irving, Texas, research company, has released Warp, a market research application designed to allow Web site owners or researchers manage the sampling, targeting and intercepting of site visitors. Warp also allows users to build opt-in dialogs or floating feedback buttons, as well as show the survey or tool directly to visitors on behaviorally-targeted pages.

Warp supports many tools and has partnered with DIY vendors SurveyMonkey, SurveyGizmo, ClickTale, 123ContactForm and Wufoo to facilitate running surveys. Additionally, users can incorporate any existing survey or research tool that can be distributed by a URL with Warp. Warp is currently in live beta and open to the public.
www.warpresearch.com

••• data visualization

Visual verbatim

Ascribe adds several features to analytics platform

Cincinnati research company Ascribe has released Ascribe Intelligence Version 7.0, the latest edition of its verbatim analytics platform. The platform upgrade aims to offer improved navigation and additional features for reporting, crosstab functionality and graphical display.

The primary focus of Version 7.0 is the introduction of Ascribe Illustrator, a data visualization tool. Initially, Illustrator will be accessible by users of Ascribe Inspector but the firm plans to offer the product for Ascribe Coder in the coming months. Ascribe Inspector uses text analytics (or natural language processing) to enable users to explore comments to detect themes and concepts and sentiment. With it, companies can automatically categorize any textual data using automation and human expertise.

The update also includes several Ascribe pages that have been ported from the old ASP technology to the new ASPX technology. These changes aim to allow for more flexibility in technology for the future. Core functionality works as it did previously with some styling changes to areas such as property dialogs for appearance impact only.
www.goascribe.com

••• online research

One free, one fast

Crowdsourcing and Webcam tools aim to make research faster, more affordable

Seattle research company AnswerTap has released MagicMarkup, a DIY feedback-gathering tool intended to let agencies and researchers get free consumer feedback on their visuals, including marketing collateral, logo designs and proposed ads, through project automation.

To begin using MagicMarkup, a company must upload an image. MagicMarkup will then recruit from the company's existing fan bases on Twitter and Facebook, ensure that they're in the proper target market and solicit their feedback. Then, fans directly mark up the image, crossing out things they don't like, circling things that should be bigger and writing comments to the company. MagicMarkup aggregates all feedback into a comment

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heat map that visually displays what is and is not connecting with the audience, all free of charge.

In addition, for a fee, companies looking to expand their market research beyond their social media fan bases can also tap into AnswerTap's community of over nine million respondents, made available through a partnership between AnswerTap and Encino, Calif., research company uSamp.

AnswerTap has also debuted its Consumer Webcam Interview Service (CWIS), an online, face-to-face interview service. The offering is designed to allow marketers and researchers to participate in real-time Webcam interviews with targeted respondents from AnswerTap's pool of respondents. Users must define their desired demographics and a respondent matching the specified criteria will appear within minutes. Both MagicMarkup and CWIS are in a public beta.
www.answertap.com

••• mobile research

Heat m'app's

App uses heat mapping technology to optimize apps

Warsaw, Poland, software company Heatma.ps has debuted a touch-based analytics service for iOS designed to show every possible interaction mobile users have with a particular device. The service aims to reveal hidden issues with an app's user experience that developers would otherwise not know about.

Some of the discoveries include where people touch first, what functions are never used, what gestures people make, scrolling depth, device orientation and interface layout problems.

Heatma.ps can be installed on any iOS device. As users interact with the device during app usage, the data is sent to a data center where it's aggregated and converted into formats such as heat maps and gesture and device statistics, which are viewable inside of the app itself. Additionally, this data is translated into custom PDF reports.
https://heatma.ps

••• new product research

Framework for success

Ipsos details nine drivers to maximize innovation marketplace performance

New York research company Ipsos InnoQuest has developed an Innovation Performance Framework that identifies nine drivers critical to innovation success. The Innovation Performance Framework aims to serve as a guide for marketers to use to focus on and control the factors most likely to impact the success of their innovations.

An analysis of Ipsos' Designor database revealed that only 35 percent of innovations achieve a winning trial level in their first year. From there, Ipsos researchers took a more in-depth look at what makes for truly successful innovation, taking into account consumer perceptions, marketing realities and the impact of real-world competition.

The Innovation Potential Framework was specifically designed to help clients understand their drivers of innovation success and use them to their advantage and is built on three pillars: consumer demand, market and execution and marketing force.
www.ipsos-na.com

••• data analysis

Analytics go Universal

More comprehensive data collection and analysis with Google

Google, Mountain View, Calif., has debuted Universal Analytics, a set of features designed to improve the way data is collected and organized in a user's Google Analytics account. With Universal Analytics, users can use the Measurement Protocol to integrate data across multiple devices and platforms; improve lead generation by syncing offline and online data; design custom dimensions and custom metrics to collect data that Google Analytics doesn't automatically track; and understand how well mobile apps perform.

Universal Analytics is currently available for a limited number of beta users.
www.google.com/analytics

••• ad research

Live|Test before going live

Digital ad testing solution aims to simulate in-market performance

New York research company Ipsos ASI has debuted Live|Test, a solution designed by the company's digital advertising research team to help marketers test digital ads in a real-world situation prior to executing a broad media buy.

The ultimate goal of Live|Test is to determine which creative is working the hardest to achieve a brand's objectives; how marketers and advertisers can optimize creative before a launch; and how creative should perform across top Web sites.

Live|Test is designed to use the technology advances inherent in the online medium to ensure consumers are exposed to a brand's content during natural navigation and within a real context. Combining behavioral Web analytics with survey data, Live|Test is intended to provide a holistic measure of real brand effects and media effects. www.ipsos.com/asi

••• brand research

Meta4 for smartphones

Researchers partner to bring metaphor elicitation to mobile

Boston research company Protobrand and Research Now, Plano, Texas, have collaborated to release a smartphone version of Meta4 Insight, Protobrand's online metaphor elicitation tool for brand research. Meta4 Mobile was created by transferring Protobrand's proprietary tool onto the Research Now Mobile platform to put Protobrand's methodology into the field along a shopper's journey.

Metaphor elicitation is a technique for tapping into consumers' deep-seated perceptions and goals. Ensuring data saturation, Meta4 conducts this technique in an online setting, using a proprietary image database to encourage non-literal thinking and reveal a respondent's unconscious mind. www.protobrand.com

••• data analysis

A more seamless MarketSight

Confirmit and Kinesis users benefit with DataSync

Cambridge, Mass., research company MarketSight LLC has released MarketSight 9.2, the latest version of the company's crosstabulation software. MarketSight 9.2 features DataSync, a new capability designed to connect MarketSight directly to a client's survey tool and automatically update charts and dashboards with new survey data. In this release, MarketSight supports platforms from research companies Confirmit, Oslo, Norway, and Kinesis Survey Technologies LLC, Austin, Texas, with more survey platforms to be released on a rolling basis with every major product release.

Additional enhancements include the ability to export multiple charts per slide to PowerPoint and enhanced support for non-Latin characters. MarketSight's Key Findings users will also have a clearer indication when an export is complete by viewing a new progress bar whenever they export crosstabs, charts, dashboards and other data from Key Findings. www.marketsight.com

••• online research

Become a BrainSleuth

Research companies partner to probe for respondents' thoughts

Leominster, Mass., research software company Jibunu has partnered with Brookfield, Conn., research company Qintuit to release BrainSleuth, a survey tool designed to build on social science research to measure respondents' implicit attitudes through reaction time-based measures, including use of the implicit association test. Through the use of Jibunu's survey methodology, users can uncover what respondents are thinking and then incorporate these response-time methodologies into any online research study.

Jibunu has also released an enhanced suite of capabilities for mobile device survey research, including the ability to text survey invitations, reminders and diary prompts directly to respondents. www.jibunu.com

••• Briefly

■ Wabash, Ind., research company 3rd Screen Insights has launched a full-service mobile survey system. 3rd Screen Insights mobile survey features emotional response modeling, through association with Gainesville, Fla., research company AdSAM. The system can also be used as a sales promotional device by offering specialized coupons with custom responses for each individual, dependent on their responses. www.adsam.com

■ London research company Dub has introduced a keyword search feature for IdeaStream, its research communities platform. The keyword search is designed to allow clients to search community participants' responses and blog posts, as well as moderator probes and comments left by other members of the community. Searches include posts and responses, post titles, tags, comments and probes and open-ended survey question responses. www.dubstudios.com

■ Cincinnati research company ThinkVine and Bangalore, India, IT company Wipro Technologies have partnered to provide consumer goods companies a package of solutions and services intended to improve forecasting of marketing spends, tactics and timing across consumer groups, products, channels and geographies.

ThinkVine's marketing-mix modeling solution aims to connect predictive analytics and data with behavioral insights to allow organizations to better understand and predict where and how their consumers respond to marketing across multiple marketing touchpoints and purchase products.
www.thinkvine.com

■ San Mateo, Calif., Pinterest analytics solution company Pinfluencer has integrated with Web analytics systems such as Adobe Omniture, Coremetrics and Google Analytics to help marketers discover which pins drive revenue and clicks and measure true social ROI. Pinfluencer's Pin-to-Purchase tracker treats pins as hyperlinks and tracks actions throughout the entire sales funnel via these comprehensive third-party integrations.
www.pinfluencer.com

■ Reston, Va., research company comScore Inc. has debuted Brand Survey Lift Pulse (BSL Pulse), a campaign branding effectiveness product for measuring the breakthrough and impact of campaigns in real time. BSL Pulse is designed to enable agencies, publishers and brands to optimize campaigns in-flight. BSL Pulse includes up to five questions and offers survey setup and in-flight optimization with a single tag (employed throughout the AdEffx suite) in a single study through a single partner.
www.comscore.com

■ Vancouver, B.C., research company Vision Critical has released *The Quick and the Dead*, an e-book by Ray Poynter that addresses the changing nature of speed in society and how this change has placed increased pressure on market research professionals to make faster business decisions based on readily-accessible consumer insights. The e-book is available for download at www.visioncritical.com/quickandthedead.

■ Harpeth Marketing, a Franklin, Tenn., marketing firm serving the market research industry, has launched its Lead Nurturing Program. Lead nurturing is the ongoing process of building relationships with prospective buyers who are not quite ready to buy, with the goal of earning their business when they are ready. The Lead Nurturing Program is driven by a dedicated program specialist who manages a variety of activities for their clients, including phone calls to targeted contacts, e-mail campaigns, posting on the client's social media sites and monthly reporting.
www.leadnurturingprogram.com

■ Portland, Ore., research company Revelation Global has added three languages – Polish, Dutch and Swedish – to its Revelation Project platform.
www.revelationglobal.com

■ Tokyo research company AIP Corporation has launched AIP Asia Omnibus Online, a tool created to ask a limited number of questions across many Asian markets. AIP Asia Omnibus Online is designed to provide access to 1,000 respondents per country in up to 12 Asian countries.
www.aip-global.com

■ St. Petersburg, Fla., research company HealthFocus International has launched a study to explore how to make a processed food or beverage more natural and in which food and beverage categories natural is most important. Study sponsors can enter their brands for proprietary evaluations to determine how natural shoppers perceive their brands to be and how to improve them.
www.healthfocus.com

■ Chicago research company Mintel has launched a consumer research report series examining the Brazilian consumer market landscape. The reports, published in English and Portuguese, have been developed by Mintel's analysts in São Paulo, Brazil.
www.mintel.com

■ Scarborough Research, New York, has expanded into Puerto Rico with a new insights service. Dubbed Scarborough Puerto Rico, the service will include attitudinal data, as well as an array of consumer behavior-based measures.
www.scarborough.com

■ Market Analyst, a Falls Church, Va., distributor of market research reports and business information, has begun offering market research reports in an e-book format from its Web store at www.marketanalyst.net.

■ The CASRO Institute for Research Quality division of the Council of American Survey Research Organizations, Port Jefferson, N.Y., has awarded certification to Philadelphia research company National Analysts Worldwide for compliance to the ISO 20252 standard for market, opinion and social research. Processes outlined in ISO 20252 are designed to produce transparent, consistent, well-documented and error-free methods of conducting and managing research projects.
www.casro.org

■ Thoroughbred Research Group, Louisville, Ky., has been conditionally approved by the National Committee for Quality Assurance (NCQA), Washington, D.C., as a HEDIS Medicare Health Outcomes Survey (HOS) certified survey vendor. Upon execution of a certification agreement with NCQA and successful completion of survey vendor training in February, Thoroughbred Research Group will be fully certified as a NCQA HEDIS Medicare HOS Vendor. The company is initially certified for a maximum of 100 surveys.
www.torinc.net

■ Manchester, U.K., research company AdInsight has rebranded as ResponseTap. The company is online at www.responsetap.com.

Theory of adaptation or survival of the fittest?

| By Kristin Cavallaro

snapshot

SSI's Kristin Cavallaro reports on the firm's examination of the effects of respondent tenure on panel data.

quirks.com/articles ID 20130105

The online panel environment can often seem hostile. The avalanches of survey invitations, the agony of rejection, the dangling of the carrot and the often long and daunting surveys all weigh on the strengths of our panelists. According to the theory of adaptation, panelists should adapt and overcome these hardships.

In 2009, the issue of panel tenure was a hot topic. SSI and several leading market research companies conducted research which concluded that there were significant differences between new and tenured panelists.

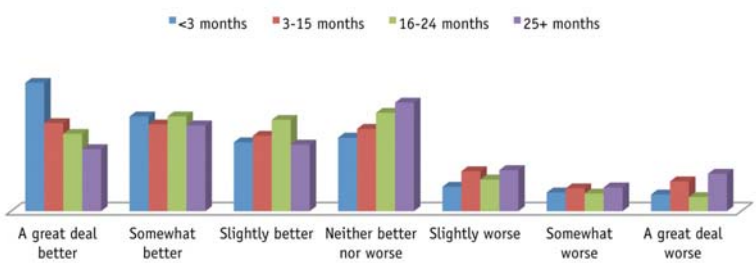
This was especially visible when looking at concept testing and propensity-to-buy questions. New panelists seemed to be more eager and more positive in these types of questions. The new panelists were more positive across a variety of different topics. An example from this research can be seen in Figure 1.

In 1864, Herbert Spencer coined the phrase "survival of the fittest" after reading *On the Origin of Species* by Charles Darwin. With this phrase, Spencer conveys that only those "fit" for a specific environment will survive. Could this in fact be the case in our panels? Does the panelist change over time, adapt to their new surroundings, if you like, or is it simply that only those who hold particular views survive the panel experience? Are they the fittest? New research from SSI examines this phenomenon.

In some experiments you see results straightaway; for this one we simply had to wait. In January 2011 SSI conducted a survey that collected over 2,000 interviews from the SurveySpot online panel. One year later we identified 770 panellists from that 2,000 who were still active. We invited these 770 to take the same survey again. We also included a sample of fresh, new SurveySpot members to also take the survey.

Just to be sure that the "problem" still exists, we also tested the hypothesis of tenured panelists being different from new panelists again in 2012. (For the purposes of this article, we define new panelists as those who have been on the panel for less than six months and tenured panelists as those who have been a member for more than six months.) As expected, based on what we saw in our 2009 test, we found differences in the answers from new and tenured panelists throughout our questionnaire. For example, new panelists tend to be quicker technology adopters than tenured panelists (Figure 2). In this example, 51 percent of the tenured panelists responded that they let a great deal or extreme

Figure 1: In Your Estimation, During the Next 10 Years, How Much Better or Worse Will Your Personal Financial Situation Be?



Source: Panel Tenure Study 2009


InterVu Webcam Focus Groups are Ideal for Hard to Reach Respondents
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Evaluating Messages
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info@focusvision.com
www.focusvision.com

Figure 2: How Much Time Do You Let Pass After a New Technology is Released Before You Use It or Purchase It?

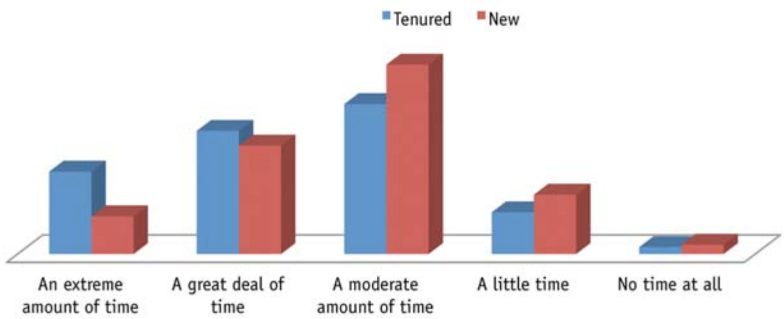


Figure 3: Purchase at $3.49

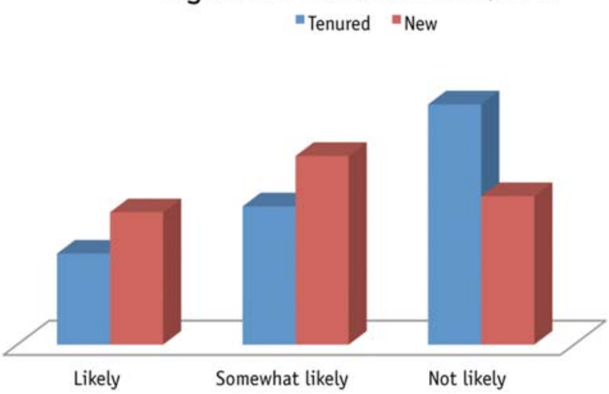
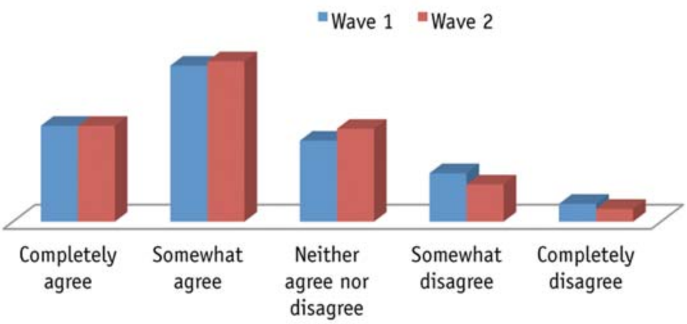


Figure 4: Price is More Important to Me Than Brand Names



amount of time pass by before purchasing new technology compared to 36 percent among newer panelists.

Differences are also evident with concept testing. SSI tested a mock concept for StartRight cereal. The first question asked how different the concept was. There was no difference in how tenured panelists answered versus new panelists. However, when it came to purchasing the cereal, the new panelists were much more likely to purchase it at any price point than the tenured panelists (Figure 3).

There were also attitudinal questions throughout the questionnaire. In nine out of 10 of the psychographic questions, the tenured panelists differed from the new. For example, when we asked if panelists viewed themselves as quiet and reserved, the tenured panelists were much more likely to agree with that statement.

So the $64,000 question remains: Did the tenured panelists change their minds over the year or did these people always think differently? To find out, we examined the answers given by individual panelists to see if they were consistent between the 2011 wave and the 2012 wave.

While we wouldn't expect everyone to answer exactly as they did a year ago, especially on soft measures using scaled questions, 60 percent of the tenured panelists did answer the same. This included attitudinal questions, reactions to concepts, ownership and more. We would expect things like ownership of small electronics to change over time since these markets are growing each year. Likewise, our cereal concept, while maybe new and different a year ago, has become more common.

Typically when we use scale questions in our questionnaires, we are not looking at the responses of each scale item. Rather we are looking at an aggregated version that, for example, combines "strongly agree" and "slightly agree" into "agree." When we do this, the percentage of those answering similarly jumps to 70 percent. What happened to the other 30 percent? Well, most of the 30 percent change their answer to a neutral option in the scale questions or their ownership or behavior changed. For example, how many people still carry around a portable CD player? There are still some people out there, but as time passes, people will trade in their CD players for more efficient MP3 players. In fact, we saw 14 percent of those who answered yes last year to owning a portable CD player now said they don't have one. Does this mean that our panelists are changing? If so, they are changing with the market, not with their tenure.

When we look at all the data side by side from the 2011 wave to the 2012 wave, we see no difference. For example, when asked how much they agree or disagree with the statement

Figure 5a: Compared to Other Breakfast Cereals on the Market, How Different Do You Consider This Product to Be?

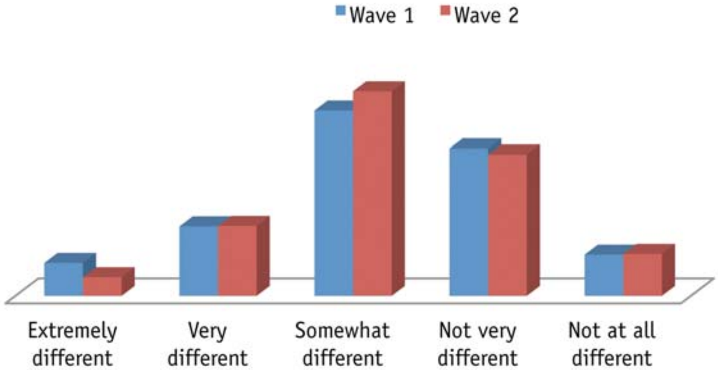


Figure 5b: If StartRight Cereal Was to Cost $4.99 For An 18 oz Box, How Likely Would You Be to Purchase It?

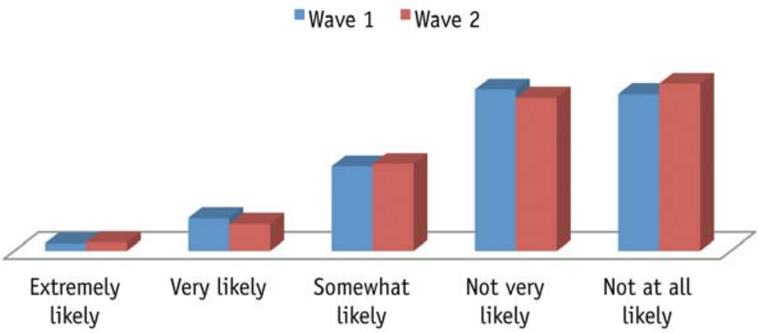
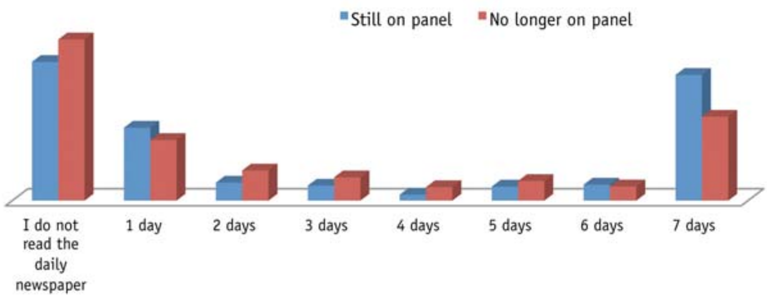


Figure 6: During the Typical Week, How Many Days Do You Read a Daily Newspaper?



"Price is more important than brand name," we saw no difference in responses (Figure 4).

The 2011 research had shown that tenured panelists tend to be less enthusiastic about concepts than new panelists. We saw the same results again in the 2012 research – but this is not because people have changed their opinions between wave 1 and wave 2. People are not changing their response behavior just because they have been on the panel longer (Figures 5a and 5b). That's just the type of person they are.

When we found that people are not changing their opinions over time, we began to scratch our heads a bit. Why then are new panelists so different from tenured panelists? To better explore this, we looked at the original responses from the 2011 data of those panelists who are no longer on the SurveySpot panel. There were approximately 1,500 panelists from the original 2011 study who are no longer members.

When we compared the data of those who are still on the panel one year later to those who are no longer on the panel, we see differences on almost every question spanning a variety of topics. For example, when we asked panelists how often they read the daily newspaper in a typical week, we see that the panelists who remained on the panel after a year are much more likely to read the newspaper every day than those who have left (Figure 6). (Note: In this comparison, the data was weighted on age and gender.)

So what does this mean? It appears that the type of person who is willing to stay on a panel for any length of time is different from the type of person who only stays for a short period. The reasons why this is so and exactly how the two groups are different will be an area for further research as this next batch of respondents is revisited a year from now. Is it possible to identify certain traits that allow us to determine early on which people will stay on a panel and which will leave?

And, does this mean that we should quota on panel tenure? No. Based on the theory from Disney's *The Lion King*, this is all part of the great circle of life. As panelists fall away they are replaced with new panelists. Some of these new panelists will be able to survive the panel environment while others will come and go. As long as the panel continues to source in the same manner, a natural balance should occur. The same is true with using a multisourced approach. As long as the methodology behind the recruitment is consistent, a natural balance of tenure and of personalities will occur in the sampling environment. This is especially so when the sample-blending approach goes beyond traditional demographics into a more psychographic-based model of balancing.

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Qi

| By Tim Macer

snapshot

Tim Macer reviews Qi, a dashboard-building tool for data exploration, review and collaboration.

Dashboards tend to be among the most advanced and also the most treacherous of deliverables for research companies to provide. Tucked away at the end of an RFP, an innocuous-sounding request for "dashboard-style reporting for managers and team leaders across the enterprise, with drill-down capabilities for self-service problem solving" will almost certainly mean something vastly more sprawling and costly to provide than anyone imagined.

Dashboard delivery can be a trap for the unwary. Many an online dashboard has become the constantly-leaking plughole in the project budget through which profits keep draining away.

What makes them difficult to control is they are usually tackled as custom developments, built using tools developed for corporate database systems and business intelligence (BI) tools. Any custom development is both costly and unpredictable and research companies often don't have the skills in-house to manage a software development project effectively. Worse than that, survey data is difficult to handle with these BI tools. They aren't designed to function smoothly with monthly waves of data, with new questions added or weighting or percentages that need to add to a constant respondent base. It's not just a matter of generating the number of records returned from a SQL query.

Manthan Services, an India-based developer, noticed the opportunity to build on the dashboard and business information systems it was providing corporate customers and developed a research-friendly package called Qi (as in "chi" or energy). An online platform for creating advanced dashboards based on survey data, Qi delivers an online environment for data exploration, review and collaboration. It is a tool for building dashboards and an environment in which end-users can then access those dashboards, share, collaborate and

Qi from Manthan Services (www.manthanservices.com/en/qi)

Pros

- Very comprehensive offering
- Understands the specifics of market research data
- Focus on collaboration and knowledge sharing
- Takes care of any complex Web and database programming

Cons

- Works on IE8 and IE9 but some formatting problems experienced on other browsers
- Online documentation/help is fairly basic
- Setup requires some skill

Pricing

- SaaS with annual subscription based on volumes. Example cost: $8,000 for up to five projects (approximately 5,000 cases and 250 variables) with discounts available for higher volumes.

quirks.com/articles ID 20130106

even, if allowed to, create their own analyses and dashboards.

It is very smart software that aims to find the middle ground between typical BI dashboard tools like SAP Crystal Dashboard Design (the new name for Xcelsius) and Tableau, where the possibilities are infinite, given enough time and money, and the fairly restrictive kinds of online dashboard creation capabilities found in some of the more up-to-date MR analysis tools. If you really want to produce any kind of dashboard, or have a client that is highly prescriptive about presentation, then you may find Qi is just not flexible enough.

On the other hand, you may be able to use the horizons as a useful limiting factor in what you do provide to your client, as it is likely to do 99 percent of what they need – just not necessarily in the first way they thought of it. For the real advantage of using this product is that you really can produce portals packed with data with relatively little effort and no programming expertise required. Furthermore, when you add new waves of data, all of their derivative reports will be updated too.

There are also built-in modules within the Qi environment to set up different kinds of dashboards or portals for certain applications. There is one for employee research, for example, and another for mystery shopping, with reporting at an individual case level. In addition, there are models provided for performance management, scorecarding and benchmarking. There is also a tool for building an organization hierarchy and this can then ensure each user is given the relevant view of the data when they log in. These can be tied to “group filters" which reflect the organization’s hierarchical structure in the actual data that get displayed.

There is an integrated alerts publisher and a user’s portals can be configured with an alerts area or tab. You then define the exceptions or thresholds where alerts should be generated. These are then recalculated for each individual user’s view of the data so they are only alerted on what is relevant to them.

Elegant concepts

There are some very elegant concepts at the heart of Qi which help to give your work shape. Everything you create is based on one of three “assets” based on data: charts, dashboards and tables. Dashboards come in a variety of shapes with placeholders for you to populate with charts or tables. There is also the concept of a “portlet,” which can house a report, an alert, a chart, favorites or messages. You can then arrange your portlets into pages or publish them on their own.

There is a reasonable though not especially exotic selection of charts – pretty much what you might find in Excel. There are, however, some nice multidimensional bubble charts.

Behind the scenes is a SQL Server database. It can be loaded with survey data using the survey metadata provided by either SPSS or Triple-S. If you want to work with other kinds of data – which is possible – you may need to get help from Manthan Services in setting up an appropriate database schema, however, and also help with the database load process.

A particular snare to be found in many RFPs asking for dashboards is the request for drill-down capabilities. There is often an assumption that deciding what to drill down to is a trivial, automatic choice. It is not – there is often more than one level of detail a user is likely to want to see when a particular KPI turns red or a trend chart shows a worrying dip. In Qi, you have two tools to satisfy this: a drill-down tool that lets the user trace the antecedents or components of any item of data and a drill-across tool which lets you move up and across in your hierarchy of reporting.

End users are provided with a lot of options out of the box to personalize their dashboards – they can create favorites, apply sticky notes, customize the view of the data, create their own portlets (if you allow this) and republish or share these with others. It can make for a highly collaborative environment both within the enterprise, and equally, between enterprise and research agency.

Overall, this is an industrial-strength platform for research companies to use to create portals and dashboard systems with a dizzying array of functionality to pick from. The documentation could be made a lot more comprehensive – it is cryptic in places and tends to gloss over some quite advanced capabilities. I also experienced some issues viewing the portals I was given access to on any browser on IE8 or IE9, though Manthan claims it works with different browsers and tablets.

Same set of tools

Max Zeller is head of the retail insights division for a large global research company in Europe. (His name has been changed at the request of his employer.) His division introduced a white-label version of Qi last year, which it presents to its customers as one of its own branded services. “Many of our clients today require online reporting,” he says. “As a global company we wanted to offer the same set of tools to all clients and also leverage on the one investment across all our companies and for most of our studies. We also wanted something that you could implement quite quickly locally, to create portals and dashboards, which did not require any programming or special skills to run it. Also we wanted a tool that both researchers and users could modify and even create their own views or dashboards for themselves.

"We looked at many different products but eventually chose one from Manthan Services. On all criteria they were on top and they understood market research, which was very important."

Though the software is very extensive, with quite a lot to learn, he says, in practice his firm's research and DP teams have found it well within their capabilities to deploy it. "The people in contact with the client – the project managers supported by DP staff – do the technical and setup work. You need someone in the team that champions the product who can translate the requirements of the client in terms of how the software is going to work. Then it can be more junior DP people who do the implementation, because it is all menu-driven – which gives them a new opportunity as well."

Zeller estimates that setting up a new portal for a client demonstration, comprising 25 different charts and allowing different levels of access, can be achieved in a day or so by his local teams – a pace that was new for the company. "Before this we had to go though IT and the process was not just longer but so much more expensive. It would have taken several days to a week with what we had before. We need to be as lean, as quick and as close to the client as possible – and that's exactly what we have here. You can give the specs from the client directly to the team – you don't really have to translate the requirements into a technical specification and that is what saves the time and delay."

Zeller strongly advises allowing adequate time to learn to use the software, however. "This is not something you can jump into in an hour – it does take two intensive days of training. But overall, I think the trade-off between functionality and ease of use is good. Once you are accustomed to the software it is easy and productive to use."

He also stresses that everyone, especially those setting client expectations, must be aware that this is a packaged solution. In other words, not all client requests may be achievable. "[When speaking with clients] you need to be aware of what you can and can't do. Even though it is very flexible, it is working to a standardized framework. There are many things you find you have not thought of first and when you try, you discover there is a way to do it. But it is not fully customizable so there are some areas you cannot change."

However, in these cost-conscious times, some imposed limits can be an advantage, as Zeller points out: "It is very difficult for research companies to earn money from these portals if what you are doing fully customized."

Overall, he concludes, "We are quite happy with this software – and I am working with people who have a lot of experience. We think it is a good solution."

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case study

••• online research

Steeped in insights

An online community keeps beverage firm Cafédirect close to its customers

| By Richard Young

snapshot

Cafédirect's online community serves as a tangible expression of the coffee and tea maker's core values and has also demonstrated a healthy ROI.

quirks.com/articles • ID 20130107

Cafédirect is a small organization – just a few dozen people work directly for the company in the U.K. But it's incredibly influential. It was the country's first, and remains its largest, 100-percent fair trade drinks brand and is the only tea and coffee business to have received accreditation from the Ethical Company Organisation, achieving No. 1 ranking and top marks in all categories across fair trade, human and animal welfare and environmental criteria.

Unsurprisingly, then, its customers tend to be passionate, engaged and activist by inclination. That passion translates into brand loyalty – and the company has long recognized the value of developing conversations with them.

"We have 'friends of Cafédirect' – a database of long-term, loyal customers who are typically hardcore fair-traders – and we correspond with them on a regular basis," says Lorraine Kelleher, the organization's strategic insights manager. With an active social media presence, it was obvious Cafédirect was a company comfortable with engagement.

"But we knew it was something of an underused resource – the communications team was really keen to get closer to them," she says. "At the same time, we hadn't done much in the way of formal research – the occasional survey, but nothing particularly rich in terms of insights. So there was a clear opportunity."

Her other challenge was building Cafédirect's reach. The team felt they understood the ethical consumer really well – after all, they were part of that community themselves. But to build a stronger business, and benefit the growers they work with, they knew they had to broaden their customer base.

Develop richer conversations

The logical step, then, was to develop richer conversations with customers. "In two of my previous roles I'd had the chance to use online

communities," Kelleher says. "At Lonely Planet, the independent travel guide publisher, we'd had a travellers' forum, which was a great way to develop conversations with a large group. And at the BBC, operating on a much bigger scale, we'd used an online panel for both surveys and qualitative elements. Given Cafédirect's size, and its existing database, I knew we were probably looking at something in between the two."

The desire to do formal research was a clinching factor. A simple online forum – perhaps even a well-designed Facebook page – might have been enough to satisfy the pure community aspect. "But we recognized very early on that having proper control over the community and being able to screen users was important," Kelleher says. "That meant having a platform specifically designed for research – incorporating screening and segmentation functions and allowing us to develop less structured formats like blogs and ideas forums. Basically, we wanted to be able to try different things."

The new platform

Cafédirect had been working with a social business design consultancy, Visceral Business, which recommended London-based Dub when the idea of the community first came up. "The big plus with Dub was they had research experience, as well as being software specialists," says Kelleher. "That gave us confidence they'd be able to offer guidance and support on getting the most value out of the platform – and in maintaining the community. Communities can easily eat into your time, so managing them well and developing actionable insights from them is key."

Dub's platform, IdeaStream, was born out of its founders' desire to bring together the best of online panels and blogging platforms in a way that could help brands get beyond a simple focus group model. "The obvious goal was to create a body of insight based on sets of questions as well as more spontaneous activities taking place within a community – ideally, leading-edge consumers who can help companies develop concepts and ideas," says Stephen Cribbett, Dub co-founder and CEO.

"Those new methods needed new technology – as well as a greater understanding of how people behave online. So the obvious next step was to take a fresh look, develop the kind of social software that could help online-savvy marketers run these communities and then lease it out to researchers and brands."

IdeaStream is a Web-based insight and co-creation community platform, designed for longitudinal communities ranging from two to more than 1,000 members. It combines online qualitative and quantitative tools, from blogs and forums to ideation exercises and picture galleries. As well as responding to exercises and tasks set them, members can start their own discussions and engage members in the community – often one of the most insightful forms of engagement.

Clear parameters

At the outset of their foray into community-building, Kelleher and the Cafédirect team were working with some clear parameters. For example, they had a modest budget. "And we're a social enterprise – 50 percent of our profits go to our growers," Kelleher says. "That meant we needed to be able to quantify the benefits from the investment in a community platform and demonstrate why it was of more value than a simple forum."

Cafédirect also had a couple of specific outputs in mind. For example, a packaging redesign in 2009 had resulted in a suboptimal performance for the brand on supermarket shelves. But in order to invest in further change, it needed to understand exactly how consumers felt about it. Nevertheless, says Kelleher, they tried to keep the brief from becoming too prescriptive.

"Speed was really interesting to the team at Cafédirect," says Cribbett. "They were working on the rebranding and developing some new pack designs so the idea of fast insight and rapid iteration really appealed. We looked at what they had – a decent database of engaged consumers and a list of e-mail addresses. Their research effort was essentially surveys sent to that database. But since we were looking for both speed and depth of insight, we decided to target the top 1 percent of customers. So we analyzed the database, helped design a screening mechanism and segmented the customers."

Tailored to the brand

Identifying potential users was one thing but because communities are designed to deliver a deeper connection than other forms of consumer interaction, they also need to be tailored to the brand. It was vital to reflect Cafédirect's strong ethical approach and community values. "Software customization played a key role," Cribbett says. "The environment had to be on-brand. It had to be both safe and exciting, while also making users feel that they were being listened to and respected."

In fact, Kelleher says, Cafédirect has found it easy to keep the look and feel of the community fresh. "Design is important," she says. "If it's too static, it can become boring but the platform allows us to change the widgets that appear on people's screens and add different elements like text boxes and pictures. There's lots of functionality to make engagement with the community easier, whether it's spur-of-the-moment questions or dropping in support messages. I'm not particularly techie, but I don't have any problems using the system."

"It's all Web-based, and that means it's also very accessible to people within Cafédirect," Cribbett adds. "It's also easy for their supplier network to access it if they like, which, for a company like Cafédirect, is a valuable piece of functionality."

A challenge

Having a flexible platform with a host of features is one thing. But a community needs members. "The implementation was really smooth, although getting people invited and on board in the first place was a challenge," says Kelleher. "You still have to manage all the database admin and send out personal invitations, as well as authorizing users. But Dub's help with the screening was a big plus."

Once Cafédirect had sent out 1,000 e-mails, she says, the project really started to capture their imagination. "Seeing the number of community members climb as people signed up was really exciting. You sensed that there was a community forming right before your eyes. And that's a serious point: An online community does give you instant gratification. You ask a question and very quickly you're getting responses back."

"The critical thing is not to force people to adopt new behaviors in order to be an active part of each community," says Cribbett. "As much as possible, it should be easy for consumers to turn up and take part. We know that in many online quantitative surveys, participation drops off markedly, partly through bad design and partly because panels can be overworked. That isn't the case with communities."

With the community building up, Cafédirect put it to the test: What about that packaging? The results were conclusive. "Even existing customers were confused by it or disliked it. And, combined with the sales results, that convinced us to make a change," says Kelleher. "When you get that kind of clear backup for decisions, it's not surprising that the community quickly becomes an important part of the business. People soon referred to our community members as Cafédirectors."

Permeated the organization

One of the big benefits for Cafédirect has been the way its community has permeated the organization. For a start, employees were members of the community from the beginning. "So they can dip into it themselves, and that's important," says Kelleher. "They know what goes on within the community, how it works and what it feels like to be a Cafédirector. The other benefit of having your own people within the community is that it's not a totally blank canvas when people start to arrive."

That's not to say it's anarchic. "Although it's highly accessible within Cafédirect, getting the right people to run the community is a key part of the project," says Cribbett. "We needed a specific skill set and Lorraine helped identify the social media team as the right place to look. She brought the market research skills, of course, but the secret to the community's success has been that the whole organization can engage with it in the right way."

Aside from the ability to customize the look for the community, Kelleher has been happy with IdeaStream's back-end functionality. "It's really straightforward. For example, we can very easily add tags and notes to conversations which makes distributing, analyzing and discussing them here within Cafédirect much easier," she says.

After the success of the packaging research – and the clear popularity among Cafédirect's employees for diving into conversations with the Cafédirectors – Kelleher wasted no time in looking for other projects. "We started to think about tea," she says.

"I looked around the organization to see how the community could support our decision-making in that market – for example, whether we should use square or round teabags."

That highlights another key consideration: How do you tackle quite dull topics in a vibrant community? "We tried to mix it up a bit – develop some more creative discussions to keep the community lively, while still testing reactions to that kind of question," Kelleher says. Dub also brought its experience in research to bear, helping the team phrase questions topics in a way that would encourage richer responses.

Creates options

One benefit of a platform solution is that it creates options – both in terms of how it's used and how big it can get. "It's true that we're probably not using it to its full capacity right now," says Kelleher. "But it's great to have that potential for the future. For example, we run monthly surveys within the community but we would also like to be able to focus on more detailed topics when the need arises."

Right now Kelleher and the rest of the Cafédirect staff are looking for richness and depth of insight rather than raw volume. "But I still want to increase the size of the community, in part to ensure we're getting fresh views into it. So we're recruiting this year and looking again at the incentives we offer to people who engage more with the community. Then we might look at monthly topics on top of the more in-depth quarterly survey, perhaps involving face-to-face interviews or groups," she says.

So while the community has more than justified itself on specific projects in the first year, the next stage might be more open-ended. "Ideally, it should become entirely self-sustaining," says Cribbett. "Spontaneous conversations are incredibly valuable – much more than if the members were only ever responding to a questionnaire or a moderator's prompt."

"The ultimate aim is to take social media research to a new level," he says. "It's great to develop insights around packaging and rebranding and those other specific questions through the community. But there's a real opportunity to tap into what consumers are saying more broadly – even outside the community. That can add another layer of sophistication, allowing organizations to reflect back into the market the language customers are using."

Return on community engagement

Cafédirect is a highly social and ethical business by definition. So no one there needs to be convinced that there's a return on community engagement. "Brands in general are increasingly 'owned' by their consumers," says Cribbett. "So getting this kind of deep engagement is really important – and that's something Cafédirect understands better than most."

But from the outset it was clear that the Cafédirectors project would need to demonstrate tangible returns, too. "My objectives included a need for the community to generate the equivalent of £40,000 worth of research and new product development insights that we would otherwise have had to commission out," says Kelleher. "It's hard to put a precise number of the smaller insights we've taken from the community, especially the value people here get from simply being part of it. But in terms of the big decisions and topics, it's easily hit that target."

The other problem that a community solves is engagement. "Survey respondents can easily lose a sense of why they are taking part – there's often no connection with the outputs," says Cribbett. "But with a community, they can see how the brand is responding and they feel part of an ongoing conversation. That's far more compelling.

"The outcome of any community activity has to be actionable insights," he says. "That means knowing a lot about the business – so, for example, working with in-house teams breaks down a lot of the barriers. We provide the platform and then pretty much everything else is the company living its own values and interacting with consumers."

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case study

snapshot

This article gives an overview of innovation games, using a case study with PayPal to illustrate how putting consumers in a game-like mind-set can drive idea generation.

••• gamification

Playing to win

PayPal nets payoff from using innovation games to understand the shopping experience

| By Liang Zhang

Mary Poppins once said that, "In every job that must be done, there is an element of fun. You find the fun and - SNAP - the job's a game!" As children, we were all hardwired to create and play games. Mundane chores like cleaning the dishes or taking out the garbage quickly became quests that needed to be conquered. We instinctively knew that playing games unleashed our imagination and magically caused time to hasten.

The experience of playing games can also be a great way to promote innovation within companies. One of the best parts of being a user experience research manager at AnswerLab is that I frequently get to work with clients who are eager to innovate and take advantage of the latest technologies and research methods, such as innovation games, to develop their digital solutions. As we'll see in the detailed case study below, we found that perfect combination with our clients on the mobile team at PayPal.

Fostering a game-play mind-set by incorporating innovation games into your research efforts with customers, and even internally with your employees, can bring research to life and produce extraordinary results. Furthermore, innovation games can be applied broadly across all product development and even business planning activities. And, doing so is easier than most people think – this article highlights some simple ways that you can start incorporating innovation game methods into your research projects right away.

Table 1

Innovation Games	Advantages	Challenges
Ideal methodology for: • Exploratory research • Early-stage concept testing • Alternative to brainstorming meetings NOT as a replacement for concrete behavioral, product or usability testing	• Participants are more invested and engaged (game play is fun!) • Alleviates participant fatigue and disinterest • Relieves pressure of coming up with "good" ideas or the "right" answers • Distracts participants from being the "analytical" product manager/ engineer or "creative" designer/ marketer • Cuts through the politics, especially in larger, more complex organizations • Focuses on real situations – avoids hypotheticals • Delivers richer, more accurate information than traditional focus groups or in-depth interviews • Generates a wealth of visual artifacts which can be used for reporting	• Can't get at hard-and-fast behavioral, product or usability testing • Requires more analysis to identify themes and trends • Need to clearly explain game objectives and rules up front • Requires researcher to set realistic expectations and solicit participants' desires and concerns • Need to account for *some* level of creative thinking and willingness to cooperate through recruiting criteria • Be prepared – requires more planning, setup and materials

Why they matter

Let us begin by reviewing what innovation games are and why they matter, before we explore some specific applications and techniques. While a more formal definition does not currently exist for innovation games, one commonly used description is that they are open-ended, primary research activities that help participants generate ideas and feedback about a product or concept[1]. While this is certainly accurate, I would like to propose that a more apt definition would be that innovation games are a process for tapping into people's inner creative confidence through game play to unlock insights about a product or concept.

Innovation games are a powerful (and fun) way to engage participants and gather richer, more accurate information because the game-play experience relieves respondents from the constraints and pressures of typical focus group or in-depth interviews (such as coming up with the "right" answers or simply trying to express an opinion when there are more dominant or outspoken members[2]). The game-play experience also has the effect of stripping away participants' fears and anxieties about social judgment, internal politics or trying to be "perfect."

Innovation games are well-suited for exploratory research, early-stage concept testing and as an alternative to brainstorming meetings because playing games taps into people's imagination and emotions to generate a wealth of creative ideas. Whereas in a typical brainstorming meeting, the objective is to come up with "good" ideas or solutions, the objective of an innovation games group is simply to play a game together. If implemented correctly, innovation games can also greatly enhance internal meetings[3] by aligning stakeholders around a shared sense of purpose, establishing ownership and prioritizing outcomes. (A tip: We have found that simply framing a brainstorming meeting as an innovation games group or workshop can dramatically improve people's willingness to engage and collaborate in the experience.)

Table 1 features is a more detailed summary of the key advantages and challenges of using innovation games.

Numerous games available

Depending on your business objectives, there are numerous published innovation games available to help you get started using this methodology. All of these innovation games work well whether you are looking to gather insights for digital or physical products/services. Table 2 identifies and groups three of the innovation game methods available on innovationgames.com, along with one of AnswerLab's own innovation games, by business objective as a starting point.

The common theme among all of these innovation games is that they remove constraints and pressures so participants are able to think creatively in a safe environment. Another key takeaway here is that innovation games are quite flexible. Depending on the game elements, objectives and rules (i.e., game dynamics/mechanics), many of these methods can be applied to achieve multiple objectives. For example, the use of anchors as a game element in the Speed Boat innovation game helps to surface (or is it sink?) participants' current pain points with a product or service. However, if we replace the anchor metaphor with propellers, then this "new" game element could be appropriate for helping to prioritize the most important features for an upcoming product release.

As part of our innovation games research, we frequently integrate several different game design elements to create new innovation game methods and experiences based on our clients' objectives. We will explore a few of these hybrid innovation game approaches in the case study below to demonstrate how a game-play mind-set can enable you, as the researcher, to come up with creative solutions to uncover deep insights. (Another tip: referring to your participants as players rather than customers, consumers or employees will empower you to think more like a game designer when creating and conducting innovation games research.)

A deep understanding

The mobile team at PayPal knows that consumers increasingly expect to have access to the same types of services they have online in the offline world via their mobile device. To drive new

Table 2

Business Objective	Innovation Game Examples	Game Objectives/Elements
Identify current pain points and wants/needs	**Speed Boat** Gives participants a way to voice their frustrations about a product/service (without being influenced by a group mentality or a single dominant person) and identify the best opportunities to improve the product/service.	• Using a speedboat as a metaphor for your product or service, the goal is to have participants draw and explain the "anchors" that are slowing down the speedboat (as representations of their frustrations) • Respondents are NOT restricted by the size, shape, weight or number of anchors tied to the speedboat, so the scale and severity of frustrations are naturally revealed
	Road Trip (AnswerLab) On any given road trip there may be unexpected bumps, roadblocks or detours along the way. This innovation game helps identify the workarounds that customers put in place to integrate your product/service into their lives.	• Begin with a storyboard of a person or family going on a road trip and explain that the journey represents the holistic experience of using your product/service • Have participants fill in scenes or captions where they encounter roadblocks, potholes or other obstacles/barriers along the journey • Participants determine the size, type, severity and number of obstacles encountered and provide a brief description for each barrier • Finally, ask participants to draw or explain a potential detour for getting around each roadblock and describe what the rest of the "smooth" journey would look like
Product/feature generation	**Remember the Future** Henry Ford's most famous adage was, "If I had asked customers what they wanted, they would have said faster horses." This innovation game gets participants to think beyond the present-day product and technology landscape to come up with truly novel ideas and solutions for what your product/service should be or do.	• Ask participants to imagine that it's some number of years in the future (we typically say five years in the future and give the actual year to be more concrete) • Instruct participants to imagine that they have been continuously using your product/service for the past five (or however many) years • Participants should then draw or write on a piece of paper what this product/service has done to enrich/enhance/benefit their lives (choose whichever adjectives work best given the context of your product/service)
Product/feature prioritization	**Buy a Feature** Provides participants a structured format to buy and negotiate features given limited resources of play money to reveal their true valuation of product features.	• Create a market for your product's (potential) features by assigning each feature a realistic price and giving participants a certain amount of play money to use for buying features • Price certain features high enough that no one person can buy them on his/her own to encourage and motivate participants to negotiate which features to buy as a group • By allowing participants to collaborate and negotiate on the purchase, they will naturally prioritize the most important set of features

product innovation in mobile and online payments, the PayPal team sought to get a deep understanding of the end-to-end in-store shopping experience, both domestically and in Europe. They needed insight into consumers' challenges with in-store payments and potential digital solutions. To address these challenges, PayPal approached us to meet these research goals:

- Identify existing behaviors and attitudes pertaining to the holistic, end-to-end shopping experience.
- Understand the retail landscape and major pain points with the current shopping experience in four key markets: U.S., U.K., France and Germany.
- Solicit ideas for improving the end-to-end shopping experience across these key markets using cross-platform technology.

Together with PayPal, we designed and implemented a multiphase research study involving several innovation game methods to meet these objectives.

Innovation game 1: Mock retail store shop-along

During the first phase of the study, we transformed a traditional usability research lab into a mock retail store environment to conduct mobile shop-alongs.

Research objectives: Identify players' mental models for using their mobile device while shopping and discover which mobile features were most important to customers and which features caused customers the most confusion or frustration in the retail store environment.

Game design and elements: Players were asked to complete a series of real shopping scenarios inside the mock retail store to test a new mobile payment application. For each scenario, some rule or element of the game was altered to change the overall shopping experience, like allowing players to pay ahead using their mobile device or to find store deals and coupons on their phone.

Key learnings/insights: In addition to identifying the most important mobile features for customers, the team also uncovered a few potential features they had not considered. One unanticipated insight occurred when a few players refused to jump ahead of others waiting in line even though they had already paid ahead on their mobile phone (we had placed several cardboard cutouts of people standing in a line to simulate the checkout). These players revealed that they were afraid of being socially scolded. This insight drove us to recommend having a separate line for customers who had already paid ahead using their phone.

Innovation game 2: Build a human shopping assistant

For the second phase of the study, we designed a series of activities starting with pre-task homework leading up to an innovation games group involving a storyboard activity to come up with an ideal human shopping assistant.

Research objectives: Understand the pain points associated with the end-to-end shopping process today and discover new factors and considerations for improving the shopping experience beyond just the payment process using mobile technology.

Game design and elements: As part of recruiting, players were asked to complete a pre-task homework activity in which they had to document and share a series of journal/diary entries. There are many benefits to including homework[4] as part of your research studies, including allowing time for independent thought and building engagement and commitment to the study.

First, players were asked to provide a photo of their physical wallet along with a written explanation of their wallet organization strategy (e.g., where they kept certain items in their wallets and why). The idea behind this was to understand players' mental models for how they might group or organize wallet items in a digital wallet on their mobile phone.

Next, players were asked to document different types of end-to-end shopping experiences over a two-week period. Players recorded their experience planning their shopping trips, shopping in various retail store environments and any follow-ups they had after shopping. These entries provided a rich set of artifacts and experiences for players to reference during the innovation games groups at the end of the two weeks.

During the innovation games groups, players were assigned to smaller teams of two to three people each and instructed to come up with an ideal human shopping assistant. They were also tasked with creating a storyboard to illustrate or write down the specific tasks that this ideal assistant would help them with during each phase of the shopping experience and to describe the personality characteristics of this human being.

By personifying the mobile technology as an ideal human shopping assistant, players were able to focus and provide feedback on the holistic shopping experience rather than trying to come up with sophisticated mobile technology solutions.

Key learnings/insights: As a result of this study, the PayPal mobile team was able to discover new factors and considerations for improving the end-to-end shopping experience beyond just the payment process. For example, the feedback from the innovation games groups helped PayPal's mobile team glean a lot of valuable insights into just how much stress people experience on routine shopping trips (such as at the grocery store). Several storyboards showed the shopping assistant helping people better stick to their diet, getting the best deals by remembering to bring and use their coupons and loyalty cards, bagging groceries while they paid at the checkout and even providing recipes and alerting them to expiration dates at home. One person in the U.K. came to the realization that what she really needed was a modern-day Mary Poppins.

Key takeaways

While innovation game methods require more upfront preparation, planning and setup than traditional qualitative research techniques, the payoffs are well worth the effort. Here are three additional key takeaways to help you start incorporating innovation games into your research projects immediately.

Be creative. The best innovation games are often ones that combine game elements from each of the three business objective categories outlined above – think about the current barriers or obstacles to innovation and apply innovation game methods to break down (or work around) those constraints.

Don't overthink it. Even simple games such as fill in the caption, show and tell or storyboards can yield rich data. We often recommend these games because most people already have some familiarity with the concept. Ben Crothers offers an excellent practical guide to storyboarding as a workshop activity[5].

Homework is your friend. As I mentioned earlier, pre-task homework activities can help build engagement and commitment up front and provide valuable data and insights even before getting your participants into the lab environment (consider this bonus research!).

Unlocks creative confidence

Research organizations can benefit greatly from developing a game-play mind-set because game play unlocks our inner creative confidence and innate ability to interact and communicate our ideas. Whether conducting research with customers or brainstorming solutions with employees, innovation games can help draw out deeper insights and provide richer, more accurate data than traditional research methods. Who knew innovation could be so much fun?

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••• advertising research

Playing nice with legal

How research can help keep marketing claims in compliance

| By Bruce Isaacson

snapshot

Using a fictional cake mix as an example, the author outlines best research practices in claim substantiation.

Although much has been written about the relationship between marketing and departments such as sales or product development, very little has been written about the relationship between marketing and legal. In many companies, it is not a cozy one. Marketers have the responsibility of attracting consumers and increasing revenues, while the legal department must keep marketing communications from causing trouble. These days, it seems that neither has an easy assignment.

Marketing and legal may interact in the area of claim substantiation. Claims convey the benefits of a product or service to customers, often by comparing with competitors. While claims can help increase sales, they can also involve risk. Claim substantiation is the process of making sure that supporting evidence is in place for statements made in advertisements, point-of-sale materials, sales brochures, product packaging and

other locations.

This article focuses on claims involving consumer perceptions. These types of claims are often supported with surveys. For example, surveys can help determine which automobile is preferred by families with kids, which toothpaste tastes the most minty or whether a drugstore shampoo leaves hair as manageable as a shampoo sold in expensive salons. When your claims involve consumer perceptions, the guidelines in this article can help reduce your marketing risk.

Table 1: Types of Claims and Burdens for Substantiation*

Claim	Type of Claim	Comparison Made	Burden for Substantiation
"Our cake has rich chocolate flavor."	Non-comparative	No comparison. Just states our benefits.	**Easiest**. Does not overtly compare our product with any competitor.
"Our cake is as good as the leading brands for rich chocolate taste."	Parity/equality claim	Our product is as good as other products.	**Easy**. Requires that our product meets the competition.
"No other cake mix beats ours for rich chocolate taste."	Parity/unsurpassed	Competitive products are not better than ours.	**Moderate**. Requires that competitors do not exceed our product.
"Our cake tastes better than Duncan Hines."	Superiority	Ours is better than the competitor's product.	**Harder**. Requires that our product is rated as tasting better than the competitor.
"Our cake has better chocolate flavor than any other pre-packaged cake you can buy."	Superlative	We beat all competitors' products.	**Hardest**. Directly compares against all major brands in the marketplace.

*For more detail, see the *Standard Guide for Sensory Claim Substantiation*, from ASTM International, West Conshohocken, Pa., 2008.

A serious matter

Companies can face legal fees, penalties and marketplace restrictions if their marketing communications do not meet the rules and regulations intended to protect consumers. Compliance is a serious matter and is enforced by a variety of authorities and venues, including the National Advertising Division of the Better Business Bureau, the federal court system and government agencies such as the Food and Drug Administration and the Federal Trade Commission (FTC).

Although the requirements vary, these authorities generally aim to ensure that the claims companies make to their customers can reasonably be expected to be true. The key word is "reasonable." In 1984, the FTC issued the "reasonable basis doctrine" [1], which states that:

1. Marketers must have a basis for substantiation before making a claim.
2. The evidence for the basis must be "reasonable" when judged by factors such as the type of claim, the risk of a false claim, the cost of developing substantiation, generally accepted principles for claim substantiation and other factors.

There are similar expectations in other venues. Although the standards, expectations and process vary, the expectation is that if you make a claim, you can support it with reasonable evidence. Reasonability is usually evaluated from the standpoint of the typical consumer, who is not necessarily an expert, who encounters the claim under conditions typical of the marketplace.

To the extent the evidence you provide as substantiation differs from that standard, all of these authorities exercise discretion is deciding how much it should count. For example, a court of law can accept or reject a survey based on how it was done or assign the survey greater or lesser weight.

Here are some guidelines to help you make sure your substantiation can support your claim.

Guideline No. 1

Phrase your claims to support marketing strategy while minimizing the burden for substantiation.

What may seem like minor changes in the wording of a claim can cause large differences in the burden for substantiation. Let's consider a fictional pre-packaged cake mix, Ready-Bake cake mix. Imagine that the marketing team at Ready-Bake is evaluating different positioning for their product and is considering different wording for text on the package and advertising. As Table 1 shows, there are a variety of claims they might consider for the chocolate taste of their cake mix and each has different implications for developing evidence for substantiation.

The easiest claim is a non-comparative claim, where there is no claim against another product. The most difficult claim is a superlative claim, which states that a product is better than all other competitive products. In between, the product might reference a single product through a superiority claim or could reference a variety of other products through parity claims. Typically, the more competitors referenced and the more specific the reference for other competitors, the higher the burdens for substantiation.

Guideline No. 2

Gather evidence for claim substantiation in a manner that matches the claim with the marketplace as much as reasonably possible.

As we gather evidence to substantiate a claim, such as a consumer survey, the evidence should be gathered in a manner to match the conditions under which real customers encounter the product in the marketplace. This guideline has a number of implications for claim substantiation conducted by survey. In the survey:

- Product forms should match the claim. For example, the Ready-Bake cake mix would be tested against other pre-packaged mixes and not pre-baked cakes.
- Attributes should match the marketplace. Other product attributes, such as package size, package type and means of product usage (e.g., pump versus aerosol for hairspray) should match the typical condi-

tions under which consumers referenced in the claim encounter the product. For the cake mix, we might test a mix of varieties or flavors that are typical of those matching the claim.

- Product formulas and versions should be current. The survey should test the product formula or version that exists in the marketplace today.
- Product conditions should be similar to the conditions that consumers encounter. The survey should test a product that is as similar as possible to the product that consumers encounter in the marketplace. For Ready-Bake, which is sold in supermarkets, it is best to purchase the mix for testing from a supermarket so that the product tested is identical to the product a consumer could purchase at retail. If we were to obtain the Ready-Bake product for our test from the factory, we might test a mix that is fresher than the mix that consumers could buy.
- Markets and geography should match the footprint of the claim. Substantiation is market-specific. If a product is sold nationally, then the claims testing should be done nationally. If a product is only sold in certain regions, the testing should be done in those regions. For products sold in multiple but distinct markets or countries, research must be done in each distinct market or country.

As we seek to match the marketplace, a survey should interview respondents who represent customers and potential customers for the item being tested. The sample should match the category on factors such as age, gender and income and should not to omit key segments. For example, in product categories where children are part of the purchase process, we may need to interview parents and children together.

Beyond matching on demographics, the research should also screen for category involvement. Category involvement may not be only at the category level but at the level of the specific product, model or flavor in question. This is particularly true for usage or taste tests; it would not be wise to test our chocolate cake mix among consumers who do not like chocolate or to test a convertible among those who only drive SUVs.

Guideline No. 3

Gather evidence for claim substantiation using research methods appropriate to the claim.

The protocol for research to substantiate claims must be appropriate to the claims tested. Three important aspects of research design include research mode, research protocol and questionnaire design.

Let's start with research mode. The two modes of research used most commonly for claims research are home-use tests, which are conducted at the respondent's home, or central location testing, which is typically conducted in a research facility in a shopping mall or focus group facility. As with other aspects of substantiation research, the choice between a home-use test and a central location test will depend upon the circumstances. For example, the Ready-Bake cake mix should most likely be tested in-home, where the respondent can prepare it according to the package directions, while a packaged, pre-baked cake may be more appropriate to test at a central location facility.

The second aspect of research design is the order in which consumers are exposed to the products, ads or packages tested. Monadic testing is a common protocol where each brand is tested on its own and then the averages are compared across brands. In a monadic design, respondents evaluate one product in one interview, which provides a very clean read on that particular product but is relatively expensive and time-consuming.

By contrast, in sequential monadic testing, respondents evaluate several products one at a time in a sequential fashion and complete a survey after trying each one. After all products have been tried, they may also compare all the products tested. This technique is less costly and less time-consuming than a pure monadic design and the sequential monadic design can allow respondents to directly compare one product versus another. However, the research must be carefully executed to avoid various kinds of bias.

The third aspect is questionnaire design. Questionnaires for claim substantiation are different than questionnaires for other types of research. When designing a study to track brand image or customer satisfaction, a researcher may include additional questions that are peripherally helpful to the core questions of interest. For example, a brand tracking study may also include questions about customer buying behavior.

When substantiating claims, questionnaires must focus only on the claims of interest and nothing more. Authorities who evaluate surveys for claim substantiation often have an inherent assumption that statements measured later in a long questionnaire could potentially be biased by statements measured earlier. As a result, claims questionnaires must be short and specific to the attributes relevant to the claims being made.

Guideline No. 4

When testing a number of claims, each claim stands on its own merits and must closely match the data.

A claim substantiation questionnaire may test a number of different claims and marketers can use the results that support their product, even if other results do not. For example, if we test Ready-Bake cake against competitors for moistness, chocolate taste and velvety texture and Ready-Bake is preferred on chocolate taste only, we can still use the results to support a claim based purely on chocolate taste.

We can state claims that closely match the data even when the tested product did not "win" the test in the traditional sense of the word. For example, if consumers in our test compare Ready-Bake to homemade cakes and one-third of consumers prefer Ready-Bake, the research can substantiate a claim that "One in three consumers prefers Ready-Bake to homemade." The statement is true and can be used. Whether it is helpful is another matter.

Statistically, what exactly does support mean? Almost always, analysis is conducted at the 95 percent level of confidence and analysis of claims data can involve a number of statistical tests specific to claims. For example, let's imagine that we measured the preference for Ready-Bake over a competitive brand. Ready-Bake was preferred 52 percent of the time, while the competitor was preferred 48 percent. The analysis of the claims data would include a statistical calculation to determine our level of confidence that our mix is indeed preferred over the competitor.

Guideline No. 5

Involve multiple functions, probably including marketing, consumer insights and legal.

The data from a claim substantiation study can be conflicting. Some claims may be easier to substantiate, others less easy. Some claims may be more likely to invoke competitive reactions and lawsuits, others less likely. Given these considerations, is it best to design substantiation research and select claims using a multifunctional team with representatives from marketing, consumer insights/research and legal. The different perspectives are critical to the task of ensuring that a claim is effective, able to be substantiated and consistent with product strategy. Words like "contains," "free" or "low-fat" may have very different meanings to a marketer than to a lawyer. Involving multiple perspectives helps yield a claim that is powerful and can be substantiated.

Substantiate first and claim second

If you follow these five guidelines, you can increase the likelihood that your claim is in compliance. As I mentioned, companies are obligated to substantiate first and claim second. In other words, substantiation should be in place before the claim is made.

There is no question that substantiation can be difficult, unpredictable and expensive. The standards for substantiation can be high. Authorities such as judges, juries and mediators must evaluate research presented in support of or in opposition to a claim and surveys conducted by experienced researchers are often criticized by smart lawyers, well-armed opposing experts and inquiring judges. Standards to evaluate surveys can vary from circuit to circuit, from judge to judge, from venue to venue and from year to year.

However, good research, corresponding to the principles described in this article, is more likely to hold up and carry the day. In this challenging environment, reasonable and well-conducted research has the best chance of prevailing.

REFERENCES

[1] See "FTC Policy Statement Regarding Advertising Substantiation," 104 F.T.C 648, 839 (1984).

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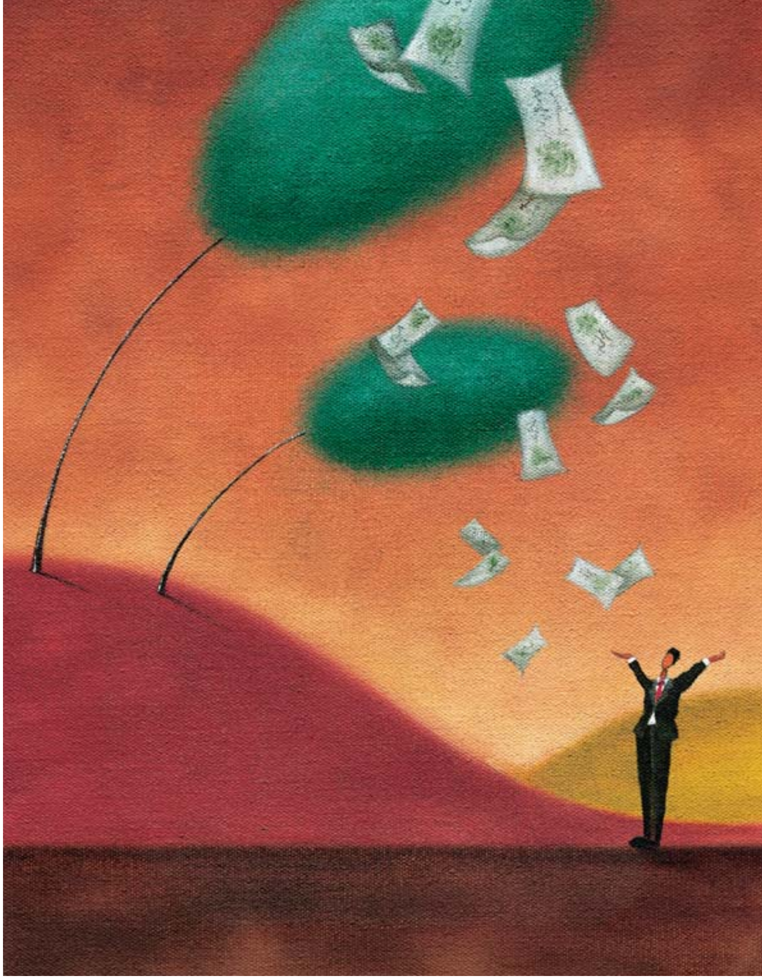

••• the business of research

Extreme makeover

Research as a profit center? It's closer than you think.

| By Kathryn Korostoff

snapshot

Sugging is perhaps the dirtiest word in our industry but does linking sales to marketing research hold the key to changing the function's image from a sunk cost to a contributor to the bottom line?

What's our hang up with money? We market researchers are so vigilant about avoiding any appearance of impropriety by mixing our endeavors with lead generation and sales processes that we are missing important opportunities – opportunities that could actually help address some of our greatest challenges: perceived credibility as a profession and quantifiable ROI.

It is time to allow the market research industry to confess: it can be, and sometimes already is, a sales tool. And if market research can be used directly to generate sales, then market research departments can be recast as profit centers.

How is this even possible? Actually, there are four ways.

Path No. 1: Market research online communities (MROCs) as sales incubators.
I have seen many MROCs that already blur the line between pure research and sales. If a company is going to test the effectiveness of coupons, bundling and discount offers by testing them with their MROC, fine. We could also use MROCs for testing referral campaigns.

But why not do it on a bigger scale, track those results and take some financial credit? Some signs indicate MROCs are growing in size; why not use direct and indirect sales activity among these members (some of whom, in the case of branded MROCs, are the highly desirable "superfans") and claim it as market research revenue? Once MROCs prove to be an effective sales tool, watch the scale grow even more.

Path No. 2: Market research departments as in-house agencies.
Increased use of the in-house research department (or, if you prefer, insourcing) is already occurring. In the past, many client-side organizations used market research agencies – which often had superior tools, superior skills and access to superior sample. Thanks to technology and other trends, these advantages have been eroding and now more client-side research departments have equal skills, tools and sample sources. Add to that the fact that, in some sectors, concerns about proprietary information leaking to competitors are at an all-time-high and

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an in-house agency model starts to look pretty compelling.

I can already hear people countering, "But an in-house department can never be really objective, so the research won't be as good." Ridiculous. Let's give market research professionals more credit. Many companies have in-house legal counsel and in-house ad agencies; are market researchers less able to maintain professional fortitude? I don't think so.

In this in-house scenario, the market research department is recast as the in-house market research agency. If organizations adopt this model, then three things could happen:

Market research will become recentralized. In many companies, market research is a mix of centralized and decentralized structure. Certain types of projects are run by the in-house research department (often brand trackers and customer loyalty studies), which may or may not outsource. Other studies have often been under the purview of specific functional areas, which tend to outsource. For example, the sales department may do the occasional win/loss study, product development may do concept testing or pricing studies and marketing may do ad hoc message-testing studies, as just a few examples. In some organizations, these functional areas are contracting with a preferred market research agency directly. But if the in-house agency truly exists, that revenue can be redirected to the new profit center.

Some project costs will be lowered. Some projects will be done with greater financial efficiency, when done entirely in-house. In-house agencies won't be paying for markups on translation, sample and professional fees.

The new agency may find ways to generate revenue by offering its services to other clients. Some companies have IT departments structured as profit centers – and there are cases where such IT departments make money selling services to other businesses. Market research in-house agencies could certainly consider a similar model and gain further profit.

Path No. 3: Monetizing existing in-house data.

As much as I detest the word "monetize," I am making an exception because it really is the right word choice here. Many organizations have enormous amounts of in-house data – why not use it to generate revenue?

Consider the recent news about MasterCard and its partnership with Exponential Interactive, a company that analyzes adverting effectiveness. As announced by Exponential in September 2012, the Exponential-MasterCard collaboration is aimed at using MasterCard-collected data about retail purchases to correlate offline and online behaviors. For MasterCard, that means it has potential to make money by using in-house data as a market research product.

Sure, credit card companies are unique in the quantity of data they have – and thus can possibly sell – but it does challenge the tradition of all customer-related data as being stashed for in-house purposes only. If anonymized data can be used to sell information services, why not? Couldn't an insurance company sell anonymized data? How about media companies? Maybe even Internet service providers? Any company that collects large volumes of data that could be anonymized and combined with other data sources to address market research challenges (finding customer groups with specific needs, prioritizing geographies based on specific behavior patterns) could be sitting on a serious asset.

Path No. 4: Mobile ethnography as research under the guise of shopping.

Sure, we all know it is unethical to engage in sugging (selling under the guise of research). But what about rugging: researching under the guise of selling? Lots of companies are now offering mobile shopping applications that include digital coupons. In just one example, *Seventeen* magazine sought to get an extra boost during this fall's back-to-school season and so launched a "Shopping Insider" app that allows readers to scan magazine images and get digital coupons on their phones that were redeemable at popular stores like Aeropostale and Bakers.

Now, *Seventeen* may have developed this as a pure sales tool but we researchers see a goldmine here, right? Why not use this kind of mobile phone application and its coupon activity for research purposes? Just seeing what coupons people access tells us something about product desire and then seeing which ones are actually redeemed gives us a conversion rate that will be a treasure-trove for marketers.

Starting in 2013, we will see the proliferation of mobile ethnography applications. Cool new tools such as LifeNotes by 20|20 Research and SmartFly by Gongos Research are just the beginning. By 2015, I predict there will be millions of consumers in the U.S. alone, happily opting-in to mobile ethnography applications and thus consenting to trade their shopping behaviors in exchange for discounts, insider status and deals. All of these resulting sales could be tracked and claimed as market research revenue.

The implications

For the sake of discussion, assume I am right and that market research becomes a profit center. Then what? What are the implications?

Market research will have more respect. The brutal truth is that more people in an organization will respect market research, when it clearly generates profit. Donald Trump doesn't get his various ploys in the news because they are, in themselves, newsworthy; he gets news coverage because he is so wealthy. Money garners respect, like it or not. And in the case of market research, this respect will come from two sources:

Leaders who bring in revenue get respect. That's just a business reality. When research managers can draw a straight line from research programs to repeat purchases, greater basket values and overall sales, they will get more respect.

Research that has tangible results will get respected. Research that suggests a future outcome based on hypothetical simulations (think conjoint) gets some respect but is often questioned because it is hypothetical. Research that shows real-world results will be harder to question. A market research cynic can't nitpick on screening criteria and statistical methods when the results are in the form of dollars spent in the real world.

Market research will have a quantifiable ROI. While not every market research project would have a quantifiable ROI, the market research department – I mean agency – will.

Market research budgets will grow. Thanks to that quantifiable ROI, research investment will grow. The profit generators will allow further investment in both profit-creating and non-profit-creating activities.

Market research departments will need to add new skill sets. Market research management teams will need to add new skills specific to these profit-generating activities and, as important, their financial management and measurement.

A fundamental shift

At the end of every year, we have dozens of market research pontificators publishing their predictions for the next year's trends. Some are thought-provoking, some are obvious and some have been wishful thinking for years. And 2012 was no different. But all of last year's chatter about mobile research, evolving client-supplier roles and non-probability sampling will pale in comparison to the implications of a fundamental shift in the market research department's financial structure as a profit center.

You don't believe me? Have you read all of the above and are still skeptical that market research departments will ever be, in reality, profit centers? Or perhaps you doubt that any of the four paths outlined above will be realized. Then consider this: If research doesn't do these things, other functional areas and entirely new organizations will. And with less rigor, and possibly ethics adherence, than professional market researchers.

Still not convinced? We have already seen some of the most interesting market research innovations come for outside of the industry in recent years. Survey platform companies such as AskYourTargetMarket and SurveyGizmo, and Webcam research platform MindSwarms, were all founded by people from outside of the market research industry. Many of the social media analysis tools were developed by academics and other non-researchers. And what about Google Consumer Surveys? Again, not from a traditional market research pedigree, yet rocking the research world's basic tenets to the core.

And inside many companies, some of the coolest innovations in customer insight now come from outside the research department. Analytics coming from IT, prediction markets from purchasing and social media analysis from advertising. What's next?

If ever there was a time to challenge our conventional thinking about the relationship between market research and sales, it is now.

Intentionally provocative

As you have likely deduced by now, this article is intentionally provocative. Some readers probably have formed a dislike for me, as the author of such heresy. Honestly, I don't think that market research departments will widely become recast as profit centers. But I do think that it is a concept worthy of consideration, at minimum in order to challenge conventional thinking about what market research can truly accomplish.

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••• packaging research

Looking for graphic evidence

Package-to-product fit assessments that improve brand alignment

| By Kevin M. Waters

snapshot

The author outlines how to use split-cell tests to determine if a product and its packaging are misaligned.

When you were growing up, did anyone ever tell you not to judge a book by its cover? It might have pertained to meeting a new kid on the block or forming an opinion based on what someone was wearing. In either scenario, you were probably told that it was wrong, or premature, to form opinions about such things without first understanding, experiencing or knowing more about the person. This may have been sage advice in the context of the above but it's not the best mantra when thinking about today's world of consumer packaged goods – especially when one considers a product's packaging.

There are all kinds of data, and even more opinions, about how many purchase decisions are made spontaneously, often right in the store aisle in front of the shelf. Graphic design firms speak, rightly so, about the need for visibility on the shelf or the ability for a package's graphics (or structure) to stand out in a crowded section and catch the eye of the potential buyer – a first moment of truth.

The package's graphics then need to quickly communicate something enticing about the product inside to encourage the shopper to pick the product up, with an eventual end-goal of purchasing it. This is especially true for first-time buyers of said product, who have not been, or only minimally been, exposed to any advertising or messaging beyond the package itself. It's this exact scenario where the advice you probably received when growing up falls short, for shoppers are doing exactly what the advisors told us we should not do – judging a product by its package.

This book-cover analogy is a two-way street in the world of packaged goods. There are lots of good covers (packages) on the shelves that will drive purchase and trial yet fall short with repeat purchase because of flaws in the book (the product) – not a good situation for the brand or business manager. Similarly, there are lots of great books (products) that will lag in purchase interest because their covers (packages) aren't working as hard or effectively to draw the buyer in – again not what a brand or business manager wants. Finding the right pack-

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Table 1: Typical Output from Split-Cell Design Isolating Product from Package

	% Associating Attribute with Product	
	Product Only (Blind)	Product with Package (Branded)
(Sample Size =)	(100)	(100)
Attribute 1**	xx%	yy%
Attribute 2	xx%	yy%
Attribute 3	xx%	yy%
Attribute 4	xx%	yy%
Attribute n	xx%	yy%

** Attributes typically include key product or brand performance metrics or drivers (e.g., overall liking; purchase intent; liking of flavor; high quality product; premium tasting product; appealing appearance; etc.).

Table 2: Example Data Output for Package/Product Fit Scenario

	% Associating Attribute with Product		
	Product Only (Blind)	Product w/ Package (Branded)	Conclusion
(Sample Size =)	(100)	(100)	No differences in associations of key brand attributes across the two interaction points. Thus, product delivers on expectations generated by package.
Key Brand Attributes			
Fresh cilantro aroma	65%	66%	
Premium taste	71%	70%	
Authentic spiciness	67%	68%	
Real tomato flavor	62%	63%	
Crispy texture	74%	72%	

age-to-product fit thus becomes essential in eliminating these situations and optimizing brand alignment across two very important interaction points.

Variables need to be isolated

Product testing, generally in a blind or unbranded manner (i.e., without influence of brand or brand elements such as packaging), is critical to understanding just how good your actual product is. Marketers need to understand this element of the mix and should invest in proper guidance testing techniques to isolate product as a variable and gain such knowledge. At the same time, an understanding of the impact of the package and brand on the product is important, and these variables need to be isolated as well. Bundling tests or research to get at the whole picture is important but it often fails to catch the nuances of how a package and product interact and fit – or don't – with each other, simply because of failure to isolate these important pieces of the mix.

There are several ways to isolate package and product performance but the most straightforward approach is to consider a split-cell test design, where a matched group (or cell) of target respondents (in this case, a user of your brand or possibly a broader group of category users of the product) react to one of the two scenarios. For example, the first group (Cell 1) evaluates just the product by itself (i.e., blind, with no reference to brand or packaging), and

Table 3: Example Data Output for Product Under-Delivery Scenario

	% Associating Attribute with Product		
	Product Only (Blind)	Product w/ Package (Branded)	Conclusion
(Sample Size =)	(100)	(100)	Packaging is emphasizing fresh, premium, authentic and real sensory cues that are not perceived in the product. Since these are key positioning elements for the brand, reformulation in these areas is recommended.
Key Brand Attributes			
Fresh cilantro aroma	49%	66%	
Premium taste	57%	70%	
Authentic spiciness	54%	68%	
Real tomato flavor	50%	63%	
Crispy texture	74%	72%	

Table 4: Example Data Output for Package Under-Delivery Scenario

	% Associating Attribute with Product		
	Product Only (Blind)	Product w/ Package (Branded)	Conclusion
(Sample Size =)	(100)	(100)	Brand's package fails to optimally communicate appearance and texture benefits. If these are known drivers of the brand or part of the brand's overall positioning, the package should be restaged to better-emphasize them.
Key Brand Attributes			
Fresh appearance	65%	49%	
Premium taste	71%	68%	
Authentic spiciness	67%	64%	
Real tomato flavor	62%	60%	
Crispy texture	74%	43%	

Table 5: Multi-Brand Interaction Summary Analysis Example Output

	Cell 1 Brand	Cell 2 Product (Blind)	Cell 3 Prod/Pkg (Branded)	Cell 4 Package Only	Cell 5 Web site
Key Brand Attributes**					
Attribute 1	xx%	+/-	+/-	+/-	+/-
Attribute 2	xx%	+/-	+/-	+/-	+/-
Attribute 3	xx%	+/-	+/-	+/-	+/-
Attribute 4	xx%	+/-	+/-	+/-	+/-
Attribute n	xx%	+/-	+/-	+/-	+/-
	Interpretation: Cells 2, 3, 4, 5, ..., n get compared to Cell 1 to determine how the various interaction points deliver on key brand (i.e., Cell 1) attributes. As an example, comparing Cell 1 to Cells 3 and 4 allows the marketer to tease out whether they have a packaging or package/product challenge versus a broader brand challenge.				

** While a core group of attributes typically span all interaction points, some attributes can and generally do vary to some extent across different points and are thus specific to that representation of the brand.

the second group (Cell 2) evaluates the product when seen in the context of the packaging (i.e., branded).

Table 1 is a basic example of output from a split-cell design, where, in this case, each cell is evaluated on a common set of metrics related to the brand (e.g., key product attributes or benefits). Comparing results across the two cells shows how and where the scenarios differ, thus arming a marketer with important information about their brand and what can be leveraged versus what requires potential improvement attention.

The above output typically has one of three outcomes:

Package/product fit: Essentially no difference between cells across key attributes and performance metrics. The brand interaction points appear to be working in concert.

Product under-delivering: The branded scenario (i.e., package with product) showing advantages over the blind scenario (i.e., product by itself, with no package or brand influence). The brand interaction points are not working in concert. Deficiencies with the product may exist and may deter repeat purchases if not reformulated.

Package under-delivering: The blind scenario (i.e., product by itself) showing advantages over the branded scenario (i.e., package with product). The brand interaction points are not working in concert. Deficiencies with the package may be prohibiting initial trial of the product by failing to effectively communicate true product strengths.

Now let's examine how to extract insights and apply action to these scenarios.

Package/product fit

Generally speaking and under most scenarios, a similar data profile for key attributes between blind (i.e., product only) and branded (i.e., product in the context of the package) evaluations of a product suggests a fit between these two brand interaction points. Using our analogy from before, this equates to a book that has met expectations generated by its cover. Marketers should seek such findings because they reveal that two primary brand interaction points are delivering similar perceptions to the target shopper and consumer. Said another way, the interaction points are aligned and are supporting desired brand benefits.

Table 2 provides a hypothetical data set for this scenario. In this example, we see that five key brand attributes for a Mexican entrée show comparable ratings across the two brand interaction points. The manager of this brand can feel confident that expectations emerging from the entrée's packaging have been delivered upon by the actual product.

While simplified, the above scenario is a key step in assessing brand alignment between a product and its packaging. While it's important to look for differences or patterns of variance between the two cells, it's also necessary to assess the absolute value/magnitude of the data to capture how well (or not) a specific interaction point is performing. In a similar context, augmenting such research with appropriate tests versus the competition should also be considered to provide a read on how each interaction point (i.e., the product and the packaging) fares versus the primary competitors. Tests such as the latter provide obvious cues which can lead to or confirm desired positioning priorities and messaging to be incorporated into and across brand interaction points.

Product under-delivery

A brand's package is often the most critical marketing vehicle that consumers will be exposed to and/or aware of, and this is especially true during shopping situations at store shelves. The package, especially for first-time buyers of a brand, communicates something about the product in a meaningful way, and in that context it creates an expecta-

Table 6: Interpretation and Implication Summary for Package-to-Product Fit Scenarios

Scenario	Main Interpretation	Main Strategy Implications
Branded = Blind	Brand interaction points working in concert Product/Package Fit "Book meets expectations generated by cover"	Confirm favorable performance of package and product versus key competitors Aggressively message brand elements across these points
Branded > Blind	Brand interaction points not working in concert Lack of fit between product and package "Cover generates expectations book can't meet"	Confirm favorable performance of package versus target competitive set Reformulate product in deficient areas to coincide with packaging strengths and key brand attributes
Branded < Blind	Brand interaction points not working in concert Lack of fit between product and package "Cover fails to leverage content strengths of book"	Confirm favorable performance of product versus key competitors Determine if product advantages represent key brand leverage or positioning options Redesign/restage graphics to reinforce product advantages

tion or a promise. When a product fails to deliver on key dimensions, that promise is broken. Going back to our earlier analogy, this equates to a book that has fallen short of expectations generated by the cover.

The implication in this scenario is that the package may in fact be successful at spurring initial purchase or trial, but repeat purchase of the brand may be in jeopardy because the product fails to live up to key expectations.

Table 3 depicts typical output of a product that under-delivers on some key brand attributes, again for a Mexican entrée. Specifically, the product fails to deliver on some key aroma and flavor characteristics, especially those that connote freshness, authenticity/realness and premium nature. For some brands this may not be an issue, but for those that have declared such items as key brand components – and reflected them as such in the brand's package – it becomes a liability. Failure to address them undermines efforts to align a brand across key interaction points. Reformulation of the product, focused on these areas, should be pursued.

Package under-delivery

The opposite scenario from the above is, of course, when a product seems to over-deliver on key brand attributes that are not properly, or optimally, reflected via its packaging. Using our analogy once again, this equates to a cover that fails to adequately support the content of the book.

Though of less concern versus the prior scenario, the main implication now is that sales may be hindered because the current package is failing to spur interest and drive demand around strong points of the product. This creates an opportunity for the marketer to better align key brand interaction points by focusing on a main marketing vehicle – in this case the package's graphics – and redesigning it to emphasize key (and known) product advantages. It also creates a potential scenario where a previously unknown leverage point could become a new strategic impetus for the brand, thus opening the door for a potential restage. In either case, understanding these dynamics can help in honing or identifying future opportunities for a brand.

Table 4 contains data from a scenario where a package under-delivers on key strengths of our same Mexican entrée product. As depicted below, the product is associated with key appearance and texture advantages that do not appear to be optimally reflected by the product's packaging. While flavor perceptions seem consistent between the two cells, the package's failure to capitalize on the appearance and texture advantages may diminish the overall appeal for the brand at the point of sale, and thus in alignment across key touchpoints.

More pieces to the puzzle

Brands today stretch across numerous interaction or touchpoints. While the above focused on two very critical points, there are certainly more pieces to the brand puzzle and the quest to assess all to better understand and control total brand alignment. Taking it to this level, a specific example and question is: What does the total brand stand for? In this context, and in addition to the packaging and the product, we could consider a brand's Web site, certain major brand advertisements or campaigns (regardless of medium) or various brand promotions, to name a few. Linking these points and assessing broader brand alignment should begin with, simply, the brand. In this context, brand is often presented as a specific and separate test cell and other interaction or touchpoints get compared to this baseline cell to ascertain which points generally meet, exceed or fall short of the desired brand profile. Table 5 represents a simplified summary of such analyses.

A manager's ability to understand and optimize each brand interaction or touchpoint so that they reinforce known or key brand elements ultimately guards the brand against liabilities or deficiencies. Periodically conducting split-cell tests such as those summarized above can provide the prescriptive data needed to understand such nuances (see Table 6 for key summary points). In particular, the analyses are especially critical for a brand's packaging and the actual product, two key points that strongly influence both trial and repeat purchases.

The next time someone asks you whether people judge a book by its cover, think about the question in the context of your brand – and then ask yourself if you can conclusively state how your brand cover and book relate to one another.

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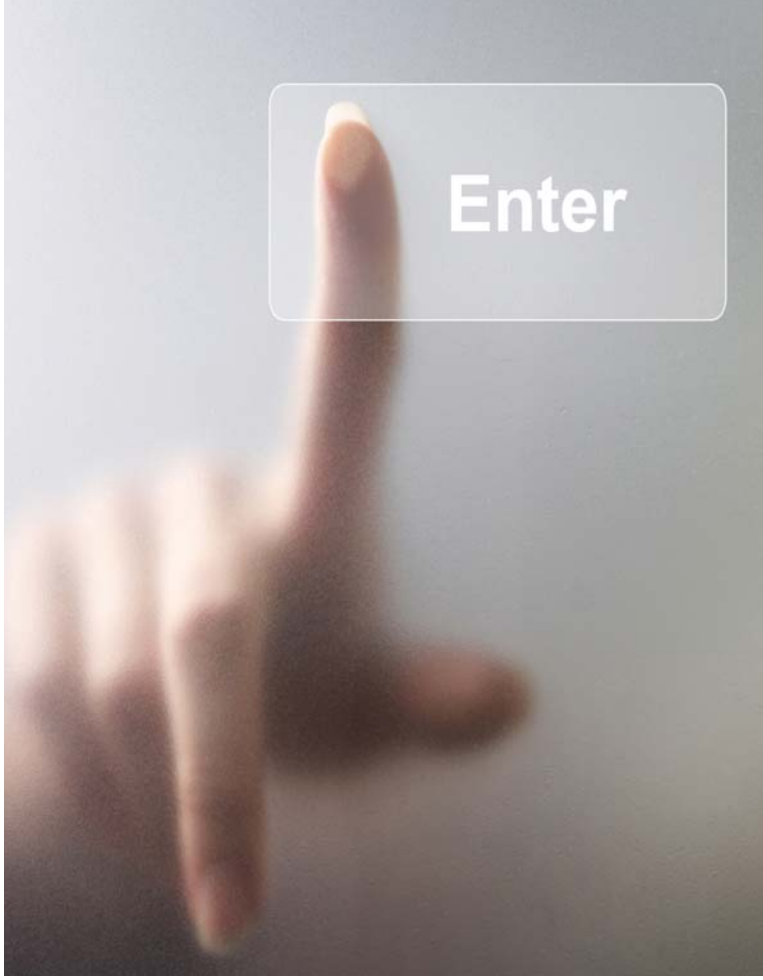

••• mystery shopping

It's everywhere you want to be

Mystery shopping in the Digital Age

| By Quirk's Staff

snapshot

Mystery Shopping Providers Association members reflect on how technology has impacted mystery shopping for the better.

With this issue's spotlight on mystery shopping, we contacted the Mystery Shopping Providers Association to get input from member companies on some of the issues and topics currently affecting the industry.

In general, mystery shopping focuses on gathering real-time insights about competition, pricing and positioning and consumer path-to-purchase that will enable clients to quickly modify processes and enact change. Over the years, it has taken many forms and undergone numerous transformations. Most of the transitions have been centered on advances in technology. For example, more and more mystery shopping companies now rely on mobile devices for in-the-moment reporting. "We've incorporated mobile technology into our Web-based reporting system, as have many providers, allowing shoppers to complete their shops while they are still in the field. As technology continues to advance, we speculate this will become a standard operating system for all shopper companies and a standard expectation from our clients in the future," says Charles Stiles, president of Mystery Shopper Services, Arroyo Grande, Calif.

"In the old days – 15 years ago – we relied on the mail to send out shop forms and fax machines and telephone calls to receive reports from the shoppers to retype and compile reports to send to the clients. If clients could receive a shop back within seven to 10 days of the interaction, they were happy. With today's technology, we can deliver much faster results - in many cases, the same day," he says.

In addition to speed of reporting, technology now also allows the capture of multiple forms of information, beyond the data contained in the individual shopper's report. "Mystery shopping is not only about shopping and evaluating process and protocol but also about evaluating how a store is maintaining brand integrity and about how the individual brands within a store are being positioned," says Kimberly Nasief, president of Measure Consumer Perspectives, Louisville, Ky.

quirks.com/articles • ID 20130112

Using competitor mystery shopping to evaluate your own SWOTs

| By Judi Hess

I first learned the importance of competitor intelligence in business graduate school. There, our professors emphasized that every business is duty-bound to understand not only who its competitors are but also their competitive strengths and weaknesses. Only then can you evaluate your own firm's relative SWOTs (strengths, weaknesses, opportunities, threats). Knowing more about your competitors will thus help your business grow and succeed.

While traditional market research is a tactical, methods-driven discipline that measures beliefs and perceptions through surveys or focus groups, competitor intelligence uses both primary and secondary research and goes beyond answering existing questions to raising new ones and guiding action. A broad definition of competitive intelligence, or CI, is "the legal and ethical activity of systematically gathering, analyzing and managing (publicly available) information on competitors." This is in sharp contrast to industrial espionage, which can be described as attempting to obtain trade secrets by dishonest means, as by telephone- or computer-tapping or infiltration of a competitor, etc.

Our firm first started offering competitive intelligence in 1992 by conducting product comparison mystery shops. These consisted of either visiting or telephoning key competitors to ascertain the pricing of various products. Since then we have been asked to shop the competition for a wide variety of reasons, primarily focusing on relative prices and customer service skills.

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Case study: trade show/event supplier

A supplier of furnishings and equipment for trade shows and events wanted to know what its key competitors charged for delivering and renting chairs, tables, bar stools, plants, wall hangings, etc., so it could review its prices and learn what was included in delivery and set-up fees as well as assess lead time needed by competitors. Mystery shoppers first checked specific competitor Web sites, then asked a few questions via e-mail and, if necessary, called those competitors personally, asking such questions as: Does your rental furniture meet state standards? How many of each item do you carry? What colors do you offer? What are the prices for rental, delivery, setup, tear down? What is the minimum order?

Sometimes this required several calls in order to gather all the information requested by the client. This client also used the information when restructuring and repricing its offerings.

Case study: communication services

A client offering TV, Internet and telephone services needed to know how prominently its products were being displayed and promoted in the big-box stores and how well that promotion was being done. Mystery shoppers visited specific stores to observe point-of-sale displays and ask about specific products to see which brands were recommended and why. For example, they looked for signs and brochures from that client, then asked the salesperson a question and noted which providers were

"Audio-recorded mystery calls; video capture and digital images and photo snapshots of product displays and associate interactions are not uncommon. All customer-facing roles can now be monitored, measured and coached to ensure every company develops brand loyalists," says Marci Bikshorn, president of Service Excellence Group, St. Louis, Mo.

Customer experience measurement providers can now present views from all touchpoints in every imaginable industry, including government agencies and assistance programs, religious congregations, as well as entertainment venues such as casinos, theaters, baseball parks and more, says Bikshorn.

In addition, mystery shops are evident in the health care industry, from pre-patient through medical treatment to home, as well as auto and life insurance compliance audits.

Sophisticated scams

As its use grows, the industry continues to be plagued by increasingly sophisticated scams targeting unsuspecting consumers looking for flexible income opportunities working as mystery shoppers. "Scam artists use the names of many reputable companies in an attempt to trick consumers into disclosing their personal information in exchange for high-paying 'mystery shops,'" says Stiles.

These scammers post multiple advertisements on online job boards affiliated with reputable news stations and on Craigslist and steal the identity of many reputable firms' Web sites, says Bikshorn.

The Mystery Shopping Providers Association, as well as member companies, are working with the FBI, the Better Business Bureau and Western Union to inform the public about mentioned and promoted by that salesperson and how positively each company was promoted. They also ascertained product knowledge and sales ability. This study helped the client measure not only the effectiveness and thoroughness with which its offerings were displayed and promoted but also how that compared with the displays and promotions of its competitors.

Case study: financial institutions

Many sophisticated clients appreciate that real competition is based not only on prices, product features or promotions but perhaps even more on the overall customer experience. This is the reason one of our bank clients has periodically asked us to shop the competition for the multiple assessments.

When a new financial institution was moving into this client's market area(s), mystery shoppers went to branches of that competitor to ascertain the product knowledge, customer service and sales ability of frontline employees, as well as what products were being emphasized and promoted. This was also the case when the client planned on expanding into a new market area. In both cases, shoppers focused on traditional mystery shop questions such as wait time, greeting skills, friendliness, attentiveness, product knowledge, need exploration, cross-selling, etc. Shoppers were asked to convey a sense of the culture and atmosphere of the competitors compared to the client's branches. This client also wanted data reports which compared the average mystery shop results of the shopped institutions to their own institution. In both instances, the client was assisted in positioning its products, services and employee presentations by the information gathered.

In another example, several financial institutions wanted to know what their top competitors charged for 10 to 20 key products as well as various features of those products. Of course this involved multiple calls, as mystery shoppers were acting as potential customers and couldn't reasonably ask the cost structure of more than a few products at a time. For example, when exploring checking accounts, the shoppers needed to find out from each financial institution its interest rates, activity charges, balance required to earn interest, minimum balance service charge, exemptions from that charge, overdraft protection fees, annual fees/interest and whether combined statements and preauthorized transactions were offered. Clients used this valuable information to restructure and sometimes reprice their own products and services.

Case study: Web sites/e-commerce

As more and more prospects and customers are shopping online, several clients have had us shop the Web sites of both their own business and those of major competitors to evaluate the look, feel and friendliness of the site, how easy it is to navigate, what products were being offered and response times to an inquiry. The mystery shoppers answered such questions as: Were you able to locate the site easily? What was your impression of the bank (or store) after reviewing their site? What three words best describe the site? How easy was the site to navigate?

They then reported their overall impressions qualitatively by explaining which financial institution or store they would do business with based on their overall experience and why. Obviously, this helped the clients determine whether and how to redesign their Web sites to be more competitive.

Involves all aspects

As you can see from these examples, competitor intelligence involves all aspects of business management, not just the products, services and prices that are traditionally the focus of market research. And competitive mystery shopping is an effective way to acquire this necessary information. It is an ethical, legal and vital business practice, invaluable in growing your business and improving your bottom line.

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these scams and to catch individuals running them but they are typically internationally-developed, making it difficult to protect the public.

The smartphone class

One of the main ways the Digital Age has impacted mystery shopping is by creating the so-called smartphone class, says Bikshorn. "These individuals are always on, consuming content and information straight from their mobile device, so utilizing a smartphone on a mystery shop assignment certainly is not a blatant give-away, as it might be if a mystery shopper entered a location with a clipboard and printed form."

With Internet access from anywhere, the smartphone class continues to frequent the Web, both in store and out, allowing integrity of data capture and accuracy; credibility and proof-of-visit through geo-verifying tools; and visual and audio recordings and image capture. "Smartphones always know where they are and when they are," says Andy Walker, president of iSecretShop, Mercer Island, Wash. "You can't easily falsify that data. We now have the ability to verify if the shopper was at the right location, at the right time, on the right day, in a way we never have before. The ability to deliver this level of accuracy significantly increases shop quality and greatly reduces the risk of fraud."

A shift in industries

Beyond the usual retail and service-based users of mystery shopping services, more research firms, insurance companies, law offices and manufacturers are utilizing mystery shopping as a way to validate claims, document patent infringements and conduct competitive market and product

Research Company Spotlight - Mystery Shopping

Below is a list of firms from our Researcher SourceBook™ specializing in mystery shopping.

Ann Michaels and Associates Ltd.
866-703-8238
www.annmichaelstld.com

Athena Research Group, Inc.
310-993-6330
www.athenamarketresearch.com

B. Business Solutions, Inc.
570-474-2212
www.bizshoptalk.com

Bare International
800-296-6699 x3131
www.bareinternational.com

Frances Bauman Associates
732-536-9712

BestMark
800-51-GUEST (514-8378)
www.bestmark.com

The Channel Checkers
800-410-5261 x1234
www.thechannelcheckers.com

Cirrus Marketing Intelligence
714-899-7600
www.cirrusmktg.com

City Research Solutions
608-826-7345
www.cityresearchsolutions.com

Corporate Research International
419-422-3196
www.mysteryshops.com

Custom Research Center, Inc.
787-764-6877
www.customresearchpr.com

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

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

Demoskopea S.r.l.
39-06-8537521
www.demoskopea.it

DSG Associates
800-462-8765
www.dsgai.com

Dynamic Advantage, Inc.
866-870-1251
www.dynamic-advantage.com

Feedback Plus, Inc.
972-661-8989
www.feedbackplus.com

Field Research, Inc.
847-776-8660
www.fieldresearchinc.com

Field Surveys & Audits, Inc.
262-646-7034
www.fsamerchandising.com

GfK Retail and Technology
212-993-5300
www.gfkrt.com/usa

Harvest Research Center
515-243-0785
www.harvestresearchcenter.com

Informa Research Services, Inc.
800-848-0218
www.informars.com

InnerDrive Strategies Inc.
323-273-8834
www.innerdriveinc.com

IntelliShop
877-894-6349
www.intelli-shop.com

Just The Facts, Inc.
847-506-0033
www.jtfacts.com

Kiyomura-Ishimoto Associates
415-566-3603
www.kiassociates.com

Maritz Research
877-4-MARITZ
www.maritzresearch.com

Market Insight Inc.
246-426-0181
www.miibarbados.com

Marketrends, Inc.
757-229-3065
www.marketrends.com

Mars Research
954-771-7725
www.marsresearch.com

McMillion Research Service » SEE AD p. 41
304-343-9650
www.mcmillionresearch.com

Measure Consumer Perspectives
502-749-6100
www.measurecp.com

Meyers Research Center
212-391-0166
www.meyersresearch.com

Mystery Researchers Research Services Group
404-351-7854
www.mysteryresearchers.com

National Shopping Service Network, LLC
303-451-0325
www.mysteryshopper.net

On Point Strategies
515-314-6568
www.on-pointstrategies.com

Perception Strategies, Inc.
877-546-0970
www.perstrat.com

Perceptive Market Research, Inc.
800-749-6760 x4012
www.pmrresearch.com

Performance Insights
702-269-8101

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

Premier Service Inc.
866-561-9666
www.premierservice.ca

Quality Assessments Mystery Shoppers, Inc.
800-580-2500
www.qams.com

Radius EMEA
44-203-130-0707
www.radius-global.com/emea

Radius Global Market Research » SEE AD p. 9
212-633-1100
www.radius-global.com

Redhill Group Inc.
949-752-5900
www.redhillgroup.com

Research & Marketing Strategies, Inc.
315-635-9802
www.RMSresults.com

Retail Diagnostics, Inc.
973-546-4500
www.rdiresearch.com

RitterAssociates
419-535-5757
www.ritterassociates.com

Schlesinger Associates » SEE AD Inside Front
732-906-1122
www.schlesingerassociates.com

Second To None, Inc.
734-302-8400
www.second-to-none.com

Secret Shopper
763-525-1460
www.secretshopper.com

Service Excellence Group, Inc.
314-878-9189
www.serviceexcellencegroup.com

Shoppers, Inc.
800-259-8551
www.insightyoucanuse.com

SIS International Research, Inc.
212-505-6805
www.sismarketresearch.com

Southern Solutions
865-392-5047
www.southernsolutionstn.com

Test Track Research, Inc.
973-360-1660
www.testtrackresearch.com

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

Wallace Data & Marketing Services
317-784-0497
www.wallacedata.com

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

audits. "We are starting to see a shift in industries utilizing mystery shopping as a means of data collection because of the speed that data can be delivered," says Stiles.

While new industries are turning to mystery shopping and employing new tools to do so, its status as a tool for monitoring employee performance endures. Mystery shopping is great for auditing specific behaviors and service cultures, as well as determining if employees are providing the type of service a company expects. "Unlike general surveys, where customers are reporting or providing information about their personal perspective of the experience, mystery shopping allows the client to outline and measure the exact performance criteria they are expecting out of their employees," says Stiles.

The most effective use of mystery shopping is dependent on the purpose of the shops and how the information is delivered, the MSPA members agree. "In regard to the most common use, which is driving employee behavior and company compliance with expected service offerings and the service culture within the organization, the most effective and critical component is in how the information is delivered. In order for the information to make a difference, it has to be shared with the associates who are interacting with the customers," says Stiles.

There must be both accountability and recognition for the service experience that was reported, Stiles says. If it was a bad experience, the results must be shared with the associate and coaching and training must be incorporated to correct the deficiencies. If it was a positive experience, then recognition for a great job should be communicated so they understand they are appreciated. This makes them feel part of the team and encourages them to continue to deliver on the experience rather than just receiving bad news when something is not right.

Question the credibility

Another persistent issue is the managing of feedback from field-level associates who question the credibility of mystery-shop results by saying things like "We knew it was a shopper" or "I never say that."

"One of the most difficult coaching moments is to throw the ball back at the field and take the stance, 'If you knew it was a shopper, why weren't you compliant to your trained best practices? Why did you fall short of your company's standards? Let's listen to this recording or watch this video so that you can understand the mystery shopper's perception of your delivery,'" says Bikshorn.

Individual analysis of mystery shop results and a clear outline of performance assist in identifying a team's competencies and disparities. With this information literally at a team's fingertips, they can quickly target development plans. Automating these painstaking processes – which had been done manually for decades – that are tied to customer experience evaluation and training, streamlines the entire accountability piece of an organization's training regimen, which in turn, benefits each level within the organizational structure.

"When effectively put into action, employees, middle managers and the executive team benefit from this type of customer experience management solution," Bikshorn says. "Creative, automated processes such as this help performance management and action planning by letting associates assess their own behaviors by clarifying expectations of each associate while providing an ongoing review process of performance and by building a strong foundation for career growth and future job placement."

For a full list of firms that conduct mystery shopping go to www.quirks.com/directory/shopping/index.aspx

Names of Note

In Memoriam...
Mimi Nichols, founder of Nichols Research, Sunnyvale, Calif., died in November 2012 at age 63.

Paul L. Arndt, former vice president at Maritz Research, St. Louis, died in November 2012 at age 73.

■ *Buffets Inc.*, a Greer, S.C., restaurant group, has hired **Tama Looney** as director, consumer insights.

■ *Panera Bread Company*, St. Louis, has elected **Diane Hessan** of Boston research company *Communispace* to its board of directors as an independent director.

■ New York research company *Kantar Health* has hired **Hettie Han** as director, Kantar Health China. Han will be based in Beijing.

■ Milwaukee research company *Market Probe* has hired **Steven Marks** as vice president and head of operations, St. Louis.

■ **Jeff Hunter** has been hired as associate at *Cambiar*, a Phoenix research consultancy.

■ Shelton, Conn., research company *SSI* has hired **Tom Johnson** as senior vice president, sales and client services, North America.

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ID 20130114

■ *Pulse Group PLC*, a Kuala Lumpur, Malaysia, research company, has appointed **Katie Lee** as senior account manager, research.


Lee

■ **Shachi Kurl** has been named director, communications, at Vancouver, B.C., research company *Vision Critical*. Additionally, the company has appointed **Alexandra Samuel** as vice president, social media.

■ Cincinnati research company *Burke, Inc.* has promoted **Rene Watanabe Day** to vice president, senior account consultant, client services.


Watanabe Day

■ *Harpeth Marketing*, a Franklin, Tenn., marketing firm serving the market research industry, has hired **Jacqueline Hayes** as program specialist to oversee the firm's Lead Nurturing Program.


Hayes

■ *Thoroughbred Research Group*, Louisville, Ky., has named **Janelle Cambron-Mellott** director, research design and analytics. Cambron-Mellott will be based at the company's headquarters and in Houston.

■ **Dan Coffin** has joined London research company *Illuminas* as research director, global health care.

■ Surrey, U.K., research company *EasyInsites* has named **Alastair Macmillan** sales director.

■ *Insight Strategy Group*, a New York research company, has promoted **Slaine Jenkins** to research manager and **Amalia Branaa** to senior designer.

■ **Sue Symons** has rejoined Roswell, Ga., research company *Moore & Symons Inc.* as senior vice president and head of its Coupeville, Wash. office.

■ **Walter Patanella** has been named CEO, media monitoring and evaluation, at London research company *Kantar Media*.

■ **Mike Mallinson** has been named president of *The Access Partnership*, a London research company.

■ San Mateo, Calif., research company *Aggregate Knowledge* has named **Rob Gatto** president.

■ New York research company *Repucom* has hired **Bruno Lalande** as director, strategy, Europe, Middle East and Africa. Lalande will be based in Paris.

■ **Robert Clark** has joined Rochester, N.Y., research company *Harris Interactive* as senior vice president.

■ **Matthew Hurst** has joined Bangalore, India, research company *Borderless Access* as associate vice president, sales, Europe. Hurst will be based in the U.K.

■ *Chaordix*, an Alberta, Calgary, research company, has named **Carey Houston** COO; **Jim Gibson** executive vice president, global markets; and **Randy Corke** vice president and senior principal, crowdsourcing advisory services.

■ *MMR Research Worldwide*, Oxfordshire, U.K., has made the following appointments: **Janine Gamon**, director, client services; **Tom Pile**, **Dan Hibbs** and **Tim Button**, associate director; **Helena Nilsson-Ghosh**, research manager; **Mark Osborn**, survey programmer; and **Alice Parry**, trainee research executive.

Research Industry News

News notes

■ Judge Susan Illston has accepted the terms of a settlement deal between **Google**, Mountain View, Calif., and the **Federal Trade Commission** (FTC), Washington, D.C., in which Google will pay a $22.5 million fine for circumventing privacy protections in Apple's Safari browser.

Google was charged with dropping tracking cookies on the computers of Safari browser users who thought they had opted out. The FTC claimed Google had previously told Safari users that the browser's default block on third-party cookies made it unnecessary for them to actively opt out of Google's own advertising tracking cookie.

■ Columbia, Md., research company **Arbitron Inc.** has entered into a settlement agreement with **Magic Broadcasting LLC**, Panama City, Fla., and **Magic Broadcasting Alabama Licensing LLC** that resolves the November 2011 lawsuit in which Arbitron alleged that Magic Broadcasting improperly used proprietary or copyrighted Arbitron materials, information and data after the expiration of its license agreement with Arbitron.

■ The **FTC** has released a staff report, titled "Facing Facts: Best Practices for Common Uses of Facial Recognition Technologies," to help companies using facial recognition technologies protect consumers' privacy as they create new commercial products and services.

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ID 20130115

Acquisitions/transactions

■ **Diversified Agency Services** (DAS), a division of New York communications company **Omnicom Group Inc.**, has acquired London innovation consultancy **Promise Corporation**. DAS plans to integrate Promise into Boston research company **Communispace**, which DAS acquired in 2011.

■ **Aegis Group PLC**, London, has acquired Benelux marketing and analytics company **Netsociety**. Aegis will merge Netsociety into its existing search and performance marketing division, **iProspect**.

■ Berlin research company **SensoMotoric Instruments GmbH** has sold its ophthalmic division to Fort Worth, Texas, eye care company **Alcon**.

■ New York researcher **The Nielsen Company** and **NM Incite**, a joint venture between Nielsen and McKinsey and Company, has acquired **SocialGuide**, a New York social TV measurement, analytics and audience engagement company. SocialGuide will be integrated into NM Incite.

Alliances/strategic partnerships

■ **Kinesis Survey Technologies LLC**, Austin, Texas, has partnered with Carol Stream, Ill., research company **StartSampling** to allow Kinesis users to conduct in-depth product testing research with StartSampling and then collect consumer feedback via Kinesis Survey.

■ New York researcher **The Nielsen Company** has formed a strategic alliance with Singapore research company **Informate Mobile Intelligence**. Dubbed Nielsen Informate Mobile Insights, the alliance covers Asia-Pacific, the Middle East and Africa and will study how consumers use mobile devices and consume mobile content.

■ **Integration Marketing and Communications Limited**, Nicosia, Cyprus, and Kuala Lumpur, Malaysia, research company **Pulse Group PLC** have partnered to address how companies measure the effect of their marketing effectiveness and account for their marketing investments.

Association/organization news

■ **ESOMAR**, Amsterdam, the Netherlands, has elected its council for 2013-14: Dan Foreman, president; Fred John, vice president; Tatiana V. Barakshina; Michael Bendig; Bruno Colin; Pramod Kumar; Luiz Campos de Sá Lucas; Niels Schillewaert; Pravin Shekar; and David Smith. Dieter Korczak will remain on the council as past president for the term.

■ **The Qualitative Research Consultants Association**, St. Paul, Minn., has elected its 2012-13 board of directors: Susan Saurage-Altenloh, president; Kendall Nash, vice president; Mark Sumpter, treasurer; Monica Zinchiak, secretary; Susan Abbott; Shaili Bhatt; Manny Schrager; Corette Haf; and Liz Van Patten.

■ **The Chief Marketing Officer Council**, Palo Alto, Calif., has launched the Content ROI Center, a strategic interest community dedicated to the evolving discipline of content marketing.

■ **The Promotion Marketing Association**, New York, has announced that it will become the umbrella organization for brand activation and be renamed as the **Brand Activation Association**.

Awards/rankings

■ Vancouver, B.C., research company **Vision Critical** has been named one of Canada's fastest-growing technology companies in the Deloitte Technology Fast 50 awards. The Fast 50 program recognizes the 50 fastest-growing technology companies in Canada, based on the percentage of revenue growth over five years. Vision Critical ranked 31st, with an increase in revenues of 323 percent from 2007 to 2011.

Separately, **Mario Canseco**, vice president at Angus Reid Public Opinion, a division of Vision Critical, has been named one of Canada's 10 Most Influential Hispanic Canadians.

■ New York research company **Kantar Health** has won the Best Poster Presentation Award for its poster on the effects of insulin pump therapy from the **International Society for Pharmacoeconomics and Outcomes Research** (ISPOR), Lawrenceville, N.J., at the ISPOR's annual European congress.

■ **The American Marketing Association Foundation**, Chicago, has named ***How Cool Brands Stay Hot: Branding to Generation Y*** by Joeri Van den Bergh and Mattias Behrer the winner of the 2012 Berry-AMA Book Prize for the best book in marketing. This award recognizes books whose innovative ideas have had a significant impact on marketing and related fields and set the standard for excellence.

■ **Steven Cohen** of in4mation insights, a Needham, Mass., research company, has been awarded the Next Generation Market Research (NGMR) Disruptive Innovator Individual Award at The Market Research Event in November 2012 in Boca Raton, Fla. The NGMR Disruptive Innovation Awards recognize companies and individuals that have demonstrated outstanding leadership as change agents and made significant contributions to harnessing disruptive innovation to drive research industry progress.

Additionally, New York research company **EyeTrackShop** was named the recipient of the 2012 NGMR Disruptive Innovation Award in the Research Concept Development category for making its eye-tracking technology actionable and accessible.

Finally, **Fox Broadcasting Co.**, Beverly Hills, Calif., in collaboration with San Francisco research company **trueAnthem**, won in the Thought Leadership Category for their efforts in rethinking and defining measures for evaluating social media marketing efforts.

■ **Kristin Luck** of Decipher Inc., Fresno, Calif., received two awards at the annual Stevie Awards for Women in Business. Luck was a Gold Stevie Award winner in the Women Helping Women category, recognizing her work as the founder of the Women in Research networking group for women in the market research industry. She also received a Silver Stevie Award for Female Executive of the Year in the business services category for her role as president of Decipher.

Separately, **Decipher** has received a 2012 Best in Biz Award in the Most Socially/Environmentally Responsible Company of the Year category. The Best in Biz award program is an independent business awards program judged by members of the press and industry analysts.

■ **AOL**, New York, and its market research partners, **BBDO**, New York, and **InsightsNow**, Corvallis, Ore., were named the winners Encino, Calif., research company **uSamp**'s EXPLOR Award for their "Seven Shades of Mobile" research. The awards honor technology innovation in marketing research.

■ Waban, Mass., research company **Temkin Group** has launched the Customer Experience Excellence Awards to recognize organizations for their efforts in becoming more customer-centric.

New accounts/projects

■ London survey software company **Merlinco** has signed a representative agent contract for all of Montréal research company **Voxco**'s software in the U.K and Ireland.

■ New York research company **Ipsos MediaCT** has been commissioned by **Radio Joint Audience Research**, London, to extend and expand its Radio Listener Panel for another year.

■ **Roy Morgan Research**, Melbourne, Australia, has selected Melbourne, Australia, research company **Effective Measure**'s Insight platform for its Web audience data measurement system.

■ **Market Publishers Ltd.**, London, has signed an agreement with **Daedal Research** to distribute and sell Daedal Research reports online.

■ **Johnsonville Sausage**, Sheboygan Falls, Wis., has adopted Cincinnati research company **ThinkVine**'s marketing-mix optimization software.

New companies/new divisions/relocations/expansions

■ New York research company **Millward Brown** has opened an office in Cairo, Egypt. Praveen Abraham will lead the operation.

■ Rotterdam, Netherlands, research company **MetrixLab** has opened an office in Shanghai, China.

■ Cambridge, Mass., research company **MarketSight LLC**, has opened an office in London.

■ Van Nuys, Calif., research company **SoapBoxSample**, part of the **Interviewing Service of America**, has opened for business. The company is online at www.soapboxsample.com.

■ Lisa Mills and Kathy Burklow have launched **Sprout Insight**, a Cincinnati research and consulting company. The company is online at http://sproutinsight.com.

■ Andera and Volker Gadeib have launched **SmartMunk GmbH**, an Aachen, Germany, research company. The company is online at www.smartmunk.com.

■ **Ci Research**, Cheshire, U.K., has changed its name to **Mustard** and unveiled a new corporate image. The company is online at www.mustard-research.com.

■ Nuremberg, Germany, research company The **GfK Group** has formed its Global Innovation Practice.

■ Fresno, Calif., research company **Decipher Inc.** has dubbed its London-based business **Decrypt**. All of Decipher's activities within the U.K. will operate under this name. The company is online at http://decryptresearch.co.uk.

■ **Perception Research Services International** has relocated its headquarters from Fort Lee, N.J., to Teaneck, N.J. All phone numbers and e-mail addresses will remain the same.

Additionally, PRS has relocated its Singapore office to Samsung Hub.

Research company earnings/ financial news

■ **Pentaho Corp.**, Orlando, Fla., has raised $23 million from existing investors to expand its interest in big data.

■ **Sample Answers Ltd.**, Middlesex, U.K., achieved over £1 million in 2012 revenue for the first time in three years.

■ **Confirmit**, Oslo, Norway, announced a 20 percent increase in third-quarter 2012 revenue over third-quarter 2011.

■ **Harris Interactive**, Rochester, N.Y., reported a 12 percent fall in revenues to $33 million for the first quarter of fiscal year 2013.

■ **ComScore Inc.**, Reston, Va., announced third-quarter 2012 revenue of $64.3 million, an increase of 9 percent over the third quarter of 2011.

■ **Gartner Inc.**, Stamford, Conn., reported results for third-quarter 2012. Total revenue was $374.4 million, up 8 percent compared to third-quarter 2011. Net income was $31.4 million, an increase of 3 percent over the prior-year period.

For the nine months ended September 30, 2012, total revenue was $1,141.1 million, an increase of 10 percent over the 2011 period. Net income was $107.1 million, an increase of 17 percent over the same period in 2011.

■ **The GfK Group**, Nuremberg, Germany, achieved a sales increase of 9.8 percent to 1,096.8 million euros in the first nine months of 2012.

■ **Voxco**, Montréal, posted record revenues in the first quarter of its 2012-13 financial year.

■ **Ipsos**, Paris, reported revenues of 1,277.5 million euros for the first nine months of 2012, a 51 percent increase over the first nine months of 2011. In the third quarter alone, revenues totaled 440.6 million euros.

CALENDAR OF EVENTS

••• can't-miss activities

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.

Marcus Evans will hold a conference focused on loyalty in banking and financial services on February 5-6 in New York. For more information visit www.marcusevansch.com/Loyalty2013_QUIRKS_EL.

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 American Marketing Association will hold a conference, themed "Analytics with Purpose: The Human Edge of Big Data," on March 4-5 at the U.S. Grant Hotel in San Diego. For more information visit www.marketingpower.com/calendar/pages/analytics-with-purpose-the-human-edge-of-big-data.aspx.

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 Neuromarketing Science and Business Association will hold its annual world forum on March 6-8 at the Renaissance Hotel in Sao Paolo, Brazil. For more information visit www.neuromarketingworldforum.com.

The University of Texas at Arlington (UTA) will holds its annual conference for alumni of its Master of Science in Marketing Research program on March 8 at UTA. For more information visit http://msmralumni.org.

The Pharmaceutical Marketing Research Group will hold its annual national conference on March 10-12 at Gaylord National in National Harbor, Md. 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.

Geoscape will hold a conference, themed "New American Mainstream Business Summit," on April 3-4 at the Conrad Hotel in Miami. For more information visit www.cvent.com/d/kcqsrr.

ESOMAR will hold its annual Asia-Pacific conference, themed "Asia on the Move," on April 7-9 in Ho Chi Minh City, Vietnam. For more information visit www.esomar.org/apac.

The Merlien Institute will host a conference, themed "Qualitative 360 Europe," on April 17-18 in Berlin. For more information visit www.qualitative360.com.

The Council of American Survey Research Organizations will hold a management conference on April 24-25 in New Orleans. For more information visit www.casro.org.

IIR will hold a conference focused on innovation and collaboration on May 6-8 at the Seaport Boston Hotel and Adjacent World Trade Center in Boston. For more information visit www.iirusa.com/feiusa/home.xml.

The Customer Experience Professionals Association will hold its members meeting on May 14-15 at the Hotel Del Coronado in San Diego. For more information visit www.cxpa.org/?page=event_2013_MIE.

IIR will hold a conference, themed "The Future of Consumer Intelligence," (formerly known as the IIR's Technology Driven Research Event) on May 14-16 at the Wyndham Parc 55 in San Francisco. For more information visit www.iirusa.com/technology/homepage.xml.

The Council of American Survey Research Organizations will hold its annual technology conference on May 29-30 in New York. For more information visit www.casro.org.

The Marketing Research and Intelligence Association will hold its annual conference, themed "Bridging the Gap," on June 2-4 in in Niagara Falls, Ontario. For more information visit www.mria-arim.ca.

The American Marketing Association will hold its annual advanced research techniques forum on June 9-12 at the Renaissance Blackstone Hotel in Chicago. For more information visit www.marketingpower.org.

The Marketing Research Association will hold its 2012 annual conference and expo on June 10-12 at the Walt Disney World Swan in Orlando, Fla. For more information visit www.marketingresearch.org.

ESOMAR will hold its 3D digital dimensions conference, themed "(Online + Social Media + Mobile) Research," on June 23-25 in Boston. For more information visit www.esomar.org.

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

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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 **15** Generally, kids see themselves as healthy eaters.

page **27** The person who is willing to stay on a panel for any length of time is different from the person who only stays for a short period.

page **34** "The critical thing is not to force people to adopt new behaviors in order to be an active part of each community."

page **44** Claims questionnaires must be short and specific to the attributes relevant to the claims being made.

page **49** If ever there was a time to challenge our conventional thinking about the relationship between market research and sales, it is now.

page **59** One of the main ways the Digital Age has impacted mystery shopping is by creating the so-called smartphone class.

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Congratulations to November's winner, Thomas Ferro of Bank of America, Wilmington, Del. November's prize was a free copy of *Black Still Matters in Marketing* by Pepper Miller.