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CONTENTS

Quirk's Marketing Research Review
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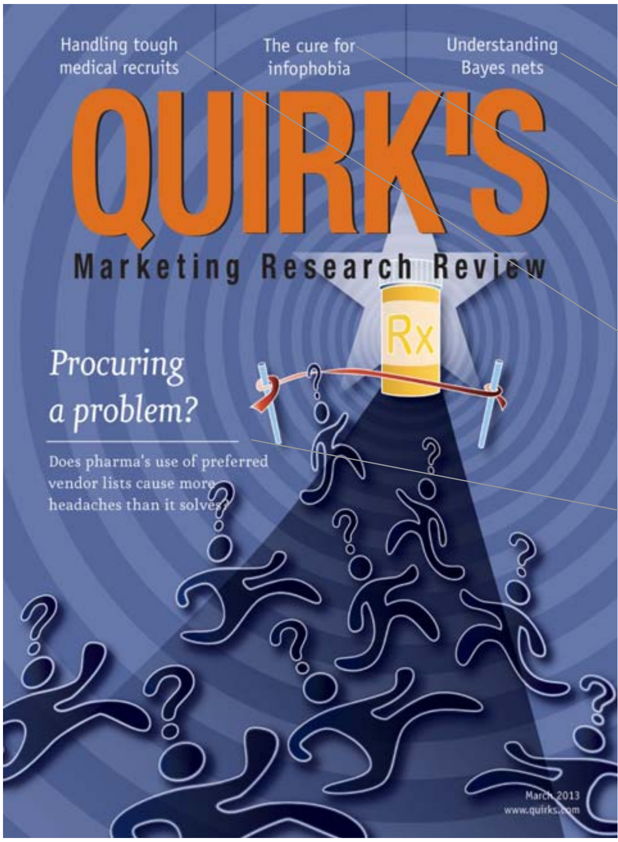

page 26

page 62

page 38

page 34

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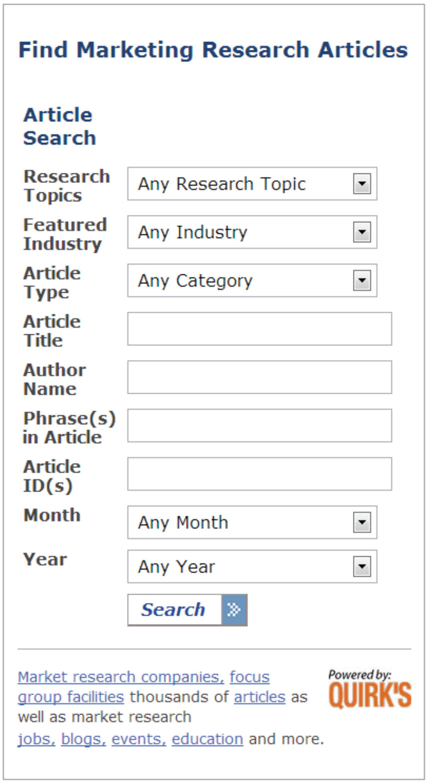
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••• trends research

Prediction: consumers to grow evermore involved with brands

It's a new year and brands are again charged with the task of understanding and catering to changing consumer attitudes. What does the future hold? Here are trendwatching.com's 10 crucial consumer trends for 2013.

Presumers and custowners. As consumers embrace participating in the funding, launch and growth of (new) products and brands that they love, expect pre-ordering, crowdfunding and consumer equity to compete with traditional consumption.

Emerging^2. Instead of developed markets catering to emerging ones and emerging markets catering to developed ones, get ready for an explosion in offerings from emerging markets for emerging markets.

Mobile moments. Consumers will look to their mobile devices to maximize and multi-if-not-hyper-task absolutely every moment.

New life inside. Rather than being discarded or even recycled, eco-focused products can be given back to nature to grow something new.

Appscriptions. Expect consumers to turn to the medical profession and medical institutions to certify and curate health apps and technologies or to "prescribe" them, much as they prescribe medicines as part of a course of treatment.

Celebration nation. Symbols, lifestyles and traditions that were previously downplayed, if not denied, by consumers in emerging markets will be a source of pride for them and objects of interest to global consumers.

Data myning. Expect savvy shoppers to take charge of their lifestyle data and turn to brands that use this data to offer them help and advice on how to improve their behavior and/or save money.

Again made here. Factors from consumers' lust for instant gratification, newism and niches; ongoing eco-concerns; the desire for more interesting stories; and new local manufacturing technologies will trigger a resurgence in domestic manufacturing in established markets.

Full frontal. Brands must move from having nothing to hide to proactively showing and proving they have nothing to hide.

Demanding brands. 2013 will see brands that are moving toward a more sustainable and socially-responsible future demanding that their customers also contribute.

quirks.com/articles ID 20130301

••• employee research

Big city, big paycheck? Not for marketers!

In late 2012, CNNMoney.com named "market research analyst" seventh on its list of top-10 best jobs in America. As it turns out, marketers don't have it so bad either – and they don't need to move to New York or California to find satisfaction or a competitive salary.

According to a survey conducted by Aquent and the American Marketing Association, the highest salaries in marketing jobs do not come from top markets like New York, Silicon Valley and Boston. Instead, based on the adjusted cost of living, marketers in Dallas, St. Louis and Atlanta are making more than their big-city counterparts. While Silicon Valley tops the list with the highest average marketing salary of $107,802, when adjusted for cost of living, it adds up to $48,034. Dallas marketing professionals take home the biggest paycheck at $82,418, or $89,707 when adjusted for cost of living.

Two-thirds of marketers anticipate salary increases in 2013, with one-fifth expecting an increase of 10 percent of more, showing optimism compared to recent years.

The happiest marketers were in Phoenix, Indianapolis and Houston. Professionals working in public relations, Web analytics and strategic planning were found to be most happy with their jobs.

By Joseph Rydholm, Quirk's Editor

Study results offer peek into shoppers' heads

©Clare Pix Photography www.clarepix.com

Joe Rydholm can be reached at joe@quirks.com

In January, *Better Homes and Gardens* released the winners of its 2013 Best New Product Awards. The winning products were chosen by more than 77,500 consumers who participated in a nationwide online survey, the American Shopper Study, conducted by Toronto research firm BrandSpark International in partnership with *Better Homes and Gardens*.

You can see a full list of the winners at www.bhg.com/bestnewproductawards and learn more about the study itself at http://bestnewproductawards.biz. But as I perused the results, I was more interested in the overview of the current mind-set of the American shopper provided by responses to a host of non-product-related questions asked as part of the BrandSpark International/Better Homes and Gardens American Shopper Study. Some sample findings, as taken from the press materials:

Food and nutrition

• A majority of Americans (81 percent) continue to pay attention to food labels.

• Italian food is the most widely-enjoyed food, eaten by 91 percent of Americans, followed by Mexican food (enjoyed by 82 percent) and Chinese (76 percent). These are also the same top three ethnic food types for Hispanic shoppers.

Beauty

• When purchasing beauty products, one in two shoppers consider it extremely important to find products that are well-priced and proven effective.

• Other important considerations for shoppers include: ease of use, trust in the brand and that the product is gentle on their skin. A desire for gentle products is also a driver behind which ingredients shoppers avoid most in skin care: ammonia, peroxides and alcohol.

Store brands vs. brand names

• More than nine in 10 shoppers have purchased private-label products in the past year.

• Private-label purchase is strong in food categories: more than six in 10 shoppers have purchased private-label dairy products, dry food and frozen vegetables.

• Products in the personal-care categories have stronger brand loyalty: four in 10 shoppers will never purchase a private-label/store brand product in categories including make-up and hair care.

• Shoppers still see value in trusted name brands and 72 percent prefer to find brand-name products on sale than to purchase private-label.

Environment

• While only four in 10 shoppers are willing to pay more for environmentally-friendly products, more than eight in 10 appreciate when the manufacturer bears the burden of production and offers an environmental benefit without increased cost.

• More than ever, manufacturers need to make sure that their environmental claims will stand up under scrutiny: Shoppers are increasingly skeptical, with three in five believing that environmentally-friendly claims are often exaggerated or misleading.

Mobile shopping habits

• Smartphones' role in retail is growing, with over half of shoppers interested in using their phone to download or scan coupons.

• 30 percent of shoppers ages 18-34 said they store their shopping list on their phone regularly or occasionally - a number bound to increase as the functionality of related apps and their ability to interact with promotion-driven marketing media improves.

Still very important

A surprising finding, in this age where digital is supposedly king, was that traditional media and channels are still very important sources of ideas on what to buy: 67 percent of shoppers reference circulars to get ideas on what to purchase on their shopping trips, making them the leading external sources of ideas. Meanwhile, almost 30 percent get ideas from recipe books and newspaper articles and approximately one in five cited both TV and magazine ads as sources of purchase ideas.

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IN FOCUS

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

Q // Survey Monitor

••• consumer research

Cash concerns erode confidence

Americans most stressed about finances, followed by employment and economy

Money tops the list of issues facing Americans in 2013, according to data from Prosper Insights and Analytics, Worthington, Ohio. Employment and the economy are also weighing on people's minds, however not nearly as much as issues relating to their finances – or lack thereof.

When asked the question, "What is the No. 1 issue facing you and your household going into 2013?", 32.3 percent said money, followed by employment at only 8.2 percent, the economy (7.5 percent), the cost of living (5.9 percent), health/illness (5.5 percent), taxes (4.4 percent), housing (3.8), debt (3.4 percent) and government (3 percent).

At the beginning of a new year, consumers are typically focused on saving money. This year, however, 77 percent of Americans have also found their paychecks shrinking from higher taxes resulting from the fiscal cliff deal, according to estimates from the Tax Policy Center. Further, outstanding consumer credit debt is up 5.9 percent from November 2011 to 2012, which equates to approximately $153 billion. The credit crunch appears to be weighing on the minds of consumers as 36.3 percent are looking to pay down debt and 36.1 percent are decreasing spending over the next three months.

Adding to consumers' money woes is the less-than-stellar employment environment, with a large portion of Americans continuing to worry about unemployment, underemployment and job security. And it's no wonder why. Though there has been an improvement in the official unemployment rate over the past year (7.8 percent December 2012 vs. 8.5 percent December 2011), the number of Americans currently looking for work remains well over pre-recession-era levels. The less-cited U-6 rate of unemployment, which includes the unemployed, the marginally-attached and those employed part-time for economic reasons, was 14.4 percent in December 2012.

Given consumers' concerns over their personal financial situation and the employment environment, it's not surprising that the economy in general ranks third on the list. Although ushering in the new year generally brings feelings of optimism, confidence in the economy declined two points from December (37.6 percent in December 2012 vs. 35.3 percent January 2013). While the percentage of those confident or very confident in the economy is elevated from January readings throughout the recession, consumer confidence will likely remain shaky in 2013. http://prospertechnologiesllc.com

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••• automotive research

Form over function

New-vehicle shoppers care about style as reliability improves

As perceptions of both reliability and actual vehicle dependability improve, new-vehicle shoppers are con-

sidering more models – and their image – before making a purchase decision, according Westlake Village, Calif., research company J.D. Power and Associates' 2013 Avoider Study. The study examines the reasons consumers do not consider – or avoid – particular models when shopping for a new vehicle.

As vehicle reliability improves across the industry, new-vehicle shoppers now consider an average of 3.3 vehicles in 2013, compared with 3.1 in 2012 and 2.9 in 2010. Additionally, fewer shoppers (21 percent) in 2013 purchased their vehicle without cross-shopping other models, compared with 26 percent in 2012 and 29 percent in 2010.

Only 17 percent of new-vehicle shoppers avoid a model due to its reputation for reliability, compared with 19 percent in 2012 and 21 percent in 2009. Not only has the perception of reliability and dependability improved but also the actual quality of vehicles has improved, as the average number of problems per 100 vehicles after three years of ownership has decreased to 132 in 2012 from 170 in 2009.

"Improved actual and perceived reliability has leveled the playing field, allowing many manufacturers to be considered among new-vehicle shoppers that may not have been considered in the past," says Jon Osborn, research director at J.D. Power and Associates. "Factors such as gas mileage, styling and comfort play an important role in the decision-making process. The study findings suggest that marketing a brand image is just as important as building reliable vehicles."

The styling of the model and the image it portrays are among the primary reasons new-vehicle shoppers avoid particular models. One-third of shoppers avoid a model because they do not like its exterior look or design, while 19 percent of shoppers do not consider a model because they don't like its interior look or design. The image a model portrays plays an important part in avoidance, as 17 percent of new-vehicle shoppers avoid a model because they don't like the image it portrays.

Gas mileage remains the most influential purchase reason, similar to 2012, with 15 percent of new-vehicle owners in 2013 saying it was the primary reason for purchasing their vehicle. Although young owners (under age 25) cite gas mileage as the most influential purchase reason more often than their older counterparts, owners in all age groups indicate gas mileage is the most influential purchase reason.

New-vehicle shoppers avoid hybrid or electric vehicles because of cost/price (36 percent) and exterior styling (25 percent) more than any other reasons. Even when considering a hybrid or electric vehicle, 36 percent of shoppers cite price/payment as the primary reason for rejecting them as a purchase option.
www.jdpower.com

••• women research

Falling short with females

Vast majority of women dissatisfied with marketers' efforts

Though women are revered as household CEOs and primary shoppers, said to control more than 80 percent of purchases across a range of categories, marketers are failing to connect with female consumers. According to a survey of 1,300 women conducted by Wilmette, Ill., research company Insights in Marketing, 91 percent of women do not feel as though marketers are marketing effectively to them.

The study, which included U.S. women from a variety of age groups, incomes, ethnicities and geographic locations, also found that women are more likely to say that companies market more effectively to men than to women and women are more likely to say that companies market to other women rather than to themselves. Even moms, a key target for many companies, do not feel that companies effectively market products to them.

Baby Boomer women, who, along with Baby Boomer men, have $1 trillion in spending power, feel disconnected from marketing messages. Millennials were most likely to connect with today's marketing messages but their spending power is less than older generations.

Ethnicity does not appear to have a noticeable impact on perception of marketing effectiveness. English-speaking Hispanic and African-American women felt similarly disconnected from marketing messages.
www.insightsinmarketing.com

••• health/wellness

Not just the nicotine

Smokers looking to quit have concerns beyond health

There are plenty of smoking-cessation products available to help Americans quit smoking and, according to a report from Chicago research company Mintel, people are expected to use them. Sales of smoking-cessation products are projected to increase 3 percent over 2011-12 and continue to grow through 2017.

However, while most people know the dangers of smoking, the addiction to nicotine isn't the only reason it's hard to drop the habit. Sixty percent of Americans who currently smoke or have previously quit say, "It's hard to motivate myself to quit because I enjoy it." Another 60 percent say, "Health warnings about smoking scare me." Nevertheless, nearly half feel strongly that they would be able to quit smoking at any time.

Moreover, among those Americans who have previously quit or are interested in quitting, 41 percent say gaining weight is their biggest challenge to quitting smoking. Of those concerned with weight-gain, 54 percent are women vs. 31 percent men.

Of the anti-smoking products currently available, 41 percent of those interested in quitting say they are interested in trying OTC nicotine sprays and 41 percent a prescription nicotine inhaler. Forty percent would go for OTC nicotine replacement lozenges and 38 percent are interested in nicotine-free cigarettes.

Of non-nicotine-replacement-based methods, 35 percent are interested in trying hypnosis, 34 percent acupuncture and some 37 percent would be interested in individual therapy or a support group specific for smoking. And, in this day and age, of course there's an app for that. Thirty percent of people are willing to try a quit-smoking app on their smartphone or tablet.

While there is an endless supply of smoking-cessation options already available, it seems consumers have some ideas of their own for different formats to help curb the craving. Of those who have previously quit smoking or are interested in quitting, almost half would be interested in a nutrition bar or a drink that could help them quit smoking and 46 percent would like a lollipop with low amounts of nicotine.

When trying different products, it's very important to 61 percent of Americans who have previously tried to quit or are interested in quitting that they aren't left with a craving and 59 percent say they don't want it to be expensive. Meanwhile, 56 percent say they want a product that's easy to understand and 54 percent think it's very important it doesn't leave a bad taste in their mouth. When it comes to support systems, 25 percent say it's very important to have an in-person support system or coach.
www.mintel.com

••• electronics research

Revered reviews

Consumer reviews are the No. 1 purchase influencer

Almost two-thirds of potential consumer electronics purchasers are inspired by a consumer review to select a brand that had not been part of their original consideration, according to a study from New York public relations company Weber Shandwick and KRC Research, Washington, D.C. In fact, the average buyer consults 11 consumer reviews on the path to purchase.

While consumer electronics buyers pay more attention to other consumers' reviews than to editorial reviews by a margin of more than three to one, 80 percent are concerned about the authenticity of consumer reviews, leading them to conduct considerable analysis before making their decision.

Consumers' journey for knowledge about consumer electronics includes several stops along the decision path. Buyers invest deliberate effort into making a well-informed decision – conducting multiple activities to gather opinions, reading an average of 11 consumer reviews, evaluating review authenticity and even demonstrating tolerance for negative reviews.

While consumers consider themselves knowledgeable about consumer electronics, they rely heavily on reviews during the decision-making process. Nearly nine in 10 consumers say they are somewhat or very knowledgeable about consumer electronics yet still consult reviews – consumer and/or professional (60 percent and 52 percent, respectively) – when looking to make a purchase.

Generally, consumer reviews trump professional reviews. Consumers report that they pay more attention to consumer reviews (77 percent) than professional critic reviews (23 percent). The gap between consumer and professional reviews closes noticeably, but not entirely, for more advanced technologies like tablets and computers.

The most influential reviews include certain elements. In consumer reviews, the most helpful ones are those that seem fair and reasonable (32 percent); are well-written (27 percent); and contain statistics, specifications and technical data (25 percent). Surprisingly, named (vs. anonymous) reviews are not as important as these other elements in consumers' minds.

Consumers trust the reviews that they find on popular Web sites, even if that Web site itself is in the business of selling consumer electronics products. Shoppers trust consumer reviews on Amazon.com (84 percent) and BestBuy.com (75 percent) the most, topping *Consumer Reports* (72 percent). Consumers show no apparent discomfort in getting their research from a seller of the products they're considering.
www.krcresearch.com

IN FOCUS

Product and Service Update

••• hispanics

Hit a moving target

Multiplatform approach to give researchers access to Hispanics

Phoenix Marketing International, a Rhinebeck, N.Y., research company, has debuted Hispanics-On-The-Move, a tool designed to offer users custom, in-language insights into various subsegments within the Hispanic population. The tool also provides information and segmentation based on level of acculturation.

Hispanics-On-The-Move blends Hispanic online panels with a panel of known Hispanic-reading/-speaking mobile phone users. Using the mobile-access platform, users will have access to more than 10 million mobile phones across the U.S., including access to less-acculturated individuals and infrequent/non-Internet users.

The company's online platform aims to provide access to an opted-in pool of respondents. Respondents can choose whether to participate in-language or in English and surveys can include a variety of multimedia stimuli.
www.phoenixmi.com

quirks.com/articles
ID 20130304

••• retailing research

Studying store traffic

Service for retailers examines visitor demographics and behavior

New York research company GfK has launched Location Insights, a service designed to help retailers understand the movements and demographics of crowds around and in specific stores, allowing retailers to optimize store location, advertising and marketing choices. Moreover, it aims to provide a deeper understanding of outlet performance and competitive store traffic.

Location Insights is intended to reveal where crowds cluster, as well as crowd movements before and after leaving specific stores, restaurants, entertainment venues or other geographic areas. The service combines this information with socio-demographic profiles from GfK consumer research and the U.S. Census.
www.gfk.com/us

••• mobile research

Share your QuickThoughts

IPad app aims to attract mobile users to research

Shelton, Conn., research company SSI has debuted QuickThoughts, an iPad app designed to improve the survey-taking experience for mobile technology users. The app offers iTunes credits as the reward for the survey-takers' time.

QuickThoughts integrates with SSI's Dynamix sampling platform. Survey-takers using the app will be incorporated into SSI's online sample, using SSI Blend, which controls sample consistency via personality, lifestyle and psychographic attributes. The app is intended to increase SSI's capacity in reaching a younger population and IT consumers and professionals.
www.surveysampling.com

••• mobile research

'Capture'ing qualitative

IPad app helps qualitative researchers manage material on-the-go

Atlanta research technology company ActiveGroup has launched Capture, an iPad app that aims to allow professional researchers to capture and upload video, audio and images from the field and then publish and share that content with clients and colleagues via The Lobby, ActiveGroup's collaborative multimedia center.

Capture is intended to be used for mobile ethnography, shop-alongs, central location testing and more. Capture – Media Recorder for Research Professionals is available from the iTunes App Store for $9.99.
www.activegroup.net

••• Briefly

■ Nuremberg, Germany, research company The GfK Group has established consistent standards for its social media analysis (SMA) offer using GfK's global network to deliver flexible Web content gathering and analyses in any language. Local specifics of the Web landscape are taken into account and SMA insights are integrated with other context-specific information, such as survey data or knowledge on purchase behavior.
www.gfk.com

■ Civicom Marketing Research Services, Greenwich, Conn., has added text and sentiment analytics to help

clients simplify the analysis of data generated from qualitative research.
www.civi.com

■ Torsion Mobile, a Des Moines, Iowa, tech startup, has released Mojaba Analytics to provide users of its Mojaba software information about mobile customers and their behaviors on a company Web site. Mojaba Analytics aims to provide insights into Web site user behaviors related to street-level location. The consumer has complete control about what they share, as the location features are permission-based. Mojaba Analytics data is owned by the customer and is not shared in aggregate.
http://torsionmobile.com/mojaba-analytics-beta

■ Quester, a Windsor Heights, Iowa, research company, has redesigned its Web site, featuring a new corporate logo and tagline.
www.quester.com

■ Chicago research company Mintel has launched Mintel Futures, an approach to trend forecasting. Stemming from a set of six trends, Mintel has identified the biggest areas of opportunity – defined as those with the broadest demographic and market coverage and greatest commercial product, service and packaging potential – for businesses targeting the global consumer market over the next five-to-10 years.
www.mintel.com

■ Harpeth Marketing, a Franklin, Tenn., marketing firm serving the market research industry, has released *Marketing and Sales for the Market Research Firm: Part 3 – 12 Reasons Why Your Marketing and Sales Might Not Be Working and What You Can Do About It*, a 19-page e-book. The e-book is available as a free download at www.harpethmarketing.com/ebook.

■ U.K. research company SPA Future Thinking has launched The Hub, a social media network open to the company's external clients and suppliers. The Hub is integrated with the company's Web site.
www.spafuturethinking.com

■ Research companies Vision Critical, Vancouver, B.C., and Academica Group, London, Ontario, have partnered to launch the StudentVu Community Panel, designed to target university and college students.
www.visioncritical.com

■ WACS Insights and Strategy has launched its early adopters/innovators survey panel, intended to guide new product research.
http://tinyurl.com/ahuwshd

■ The World Association for Public Opinion Research (WAPOR), Lincoln, Neb., and the Public Opinion Program at The University of Hong Kong have partnered to release the results of the fifth iteration of the worldwide study Freedom to Publish Opinion Poll Results. Eighty-five countries were included.

According to WAPOR, despite the continuing spread of polls, "major governmental impediments to the free flow of public opinion surveys remain common."
http://wapor.unl.edu/freedom

■ TheInfoPro, a service of 451 Research, New York, has released its latest Servers and Virtualization Study, which identifies key initiatives of senior server infrastructure managers and examines market factors and major players.
https://451research.com

■ Phyllis Barr of Barr Consulting Services, New York, has debuted two services using corporate culture marketing: Time Capsules and Social Media. With Time Capsules, Barr will work with clients to create storytelling time capsules when the company/organization has a new initiative, redesigned Web site or a significant anniversary. With Social Media, Barr advises clients on integrating their history and heritage into their social media campaigns with storytelling.
www.phyllisbarr.linktoexpert.com

■ Knoji, a Los Angeles consumer review and information provider, has released a report comparing some of the leading e-mail marketing systems, including iContact, AWeber and Constant Contact. The report is available for free on the company Web site.
http://e-mailmarketing.knoji.com

■ Rabin Research Company, Chicago, celebrated its 50th anniversary in February.
www.rabinresearch.com

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The Digitally Disrupted Consumer: Researching an Accelerating Target

James McQuivey, Vice President & Principal Analyst, Forrester Research

Digital tools and platforms have accelerated consumers, raising their expectations and changing their behaviors so that they are now moving into a permanently disrupted state. How can marketing researchers keep up with this changing consumer? James McQuivey, Ph.D., of Forrester Research and author of the new book *Digital Disruption: Unleashing the Next Wave of Innovation* will explain what digital disruption is, what it does to consumers, and how people in any role in any company have to disrupt themselves to keep up.

Winning With Data: Digital Analytics Inside the 2012 Obama Campaign

Amelia Showalter, Director of Digital Analytics, 2012 Obama Campaign

Data skills, creative thinking, and a culture of rigorous testing helped the 2012 Obama campaign win the election – and raise over half a billion dollars online. The campaign's Director of Digital Analytics, Amelia Showalter, will take you inside campaign headquarters with a discussion of the methods, experiments, and surprising discoveries of young innovators finding better ways to connect with supporters on a human level.

MRA 2013 ISC

JUNE • ORLANDO

HOW THE BEST RESEARCH PROVIDERS SHARPEN THEIR GAME

Seven things you don't know about usability testing

| By Kay Corry Aubrey

snapshot

The author offers tips for conducting more useful usability studies.

Usability testing is a vital part of the process of developing and introducing a new product or service. After all, you can create the greatest widget in the world but if no one can figure out how to use it, or if using it leads to anger and frustration rather than a sense of elation, you've not only wasted your organization's precious time and resources, you've also alienated your customer base. While many marketers and researchers recognize the value of usability testing, I've found that there are a few knowledge gaps that require filling.

1. You need to watch what they do, NOT what they say!

The goal of a usability study is to put your product into the hands of a user and see what they do with it. Do they understand the nature of the product and its key features just by looking at it and touching it? Can they perform common tasks without a lot of frustration or cumbersome extra steps? What does their facial expression and body language communicate about how they feel as they use your product? Poorly-designed technology makes people feel dumb and cranky. Usability testing is unique from other forms of qualitative research because a participant's behavior matters more than their words.

2. 10 (live) usability tests are plenty.

In our experience, 10 live tests expose 80 percent of a product's usability issues (independent studies back this up as well). When a study is properly focused and the participants carefully chosen, you start to see repeating issues by the fourth or fifth session. By the ninth session things get very repetitive. On the positive side, this repetition clarifies where the problems lie. A benefit of running live tests is that you have the chance to talk with the participants so you can explore the dimensions of their confusion.

3. You should test early and often.

It's important to find fundamental design flaws early because they are harder (and more costly) to fix later on. You don't need to have a fully-functioning product before considering a usability study. If you can draw your idea on a piece of paper or represent it in foam core you can usability-test it. Quick prototypes give you the chance to explore basic aspects of the design such as the product concept or its navigation. When presented with a rough prototype vs. a polished interface, participants tend to offer more honest feedback because they can see not a lot of work was put into the presentation. Getting critical feedback early positions your product design in the right direction and saves you time, effort and money.

4. There are many good reasons for running usability studies.

The most practical reason is to catch usability issues before your customers do or to ensure users can interact with your product fluidly and intuitively. Other good reasons include having the opportunity to see real people using your product before it ships, to compare design approaches or to match your product against the competition. Whatever

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your reasons, usability testing shines a light on how well your product "speaks" to users, meets their expectations and fits into their typical work and task flow.

5. Make sure you are asking the right people for feedback.
When you are going to base important (and costly) strategic decisions on usability testing results you want to make sure you're getting your feedback from people who match your target audience. You want it to be deep, unbiased and accurate. While enlisting family, friends and employees as participants for feedback saves money and is better than doing no testing at all, there are disadvantages. They may not be typical users, they may "know too much" or feel uncomfortable telling you what they really think because they don't want to hurt your feelings. When the stakes are high, it makes sense to invest money to recruit participants who are objective and who represent your target user.

6. Testing icons vs. testing your product's navigation requires a different mind-set.
There are distinct aspects to a product design and each requires a unique usability testing approach. At a foundational level you want to know if the product's features, functions and content are appropriate for the intended audience. Does the product seem familiar to your audience? Does its organization and navigation align with the target user's task and work flow and their understanding of how it should work? Do users know where to start, what to do next and the range of available choices? Do they understand the product's terminology? And we haven't even talked about whether they like its color scheme and button placement! A well-designed usability study will give insight into how you can improve distinct aspects of your product design.

7. Getting a functioning product out the door on time matters more than usability.
If you need to make a hard choice, it's more practical to take your best guess at a proper design and focus on getting the technology to work. You can use the early versions of your product as an opportunity to gain an accurate understanding of who your users are and how well your product fits into their world. Then you can make refinements with each new version of the design. The process is iterative – with a commitment to usability you will get there!

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We have the tools to help you make sense of the world.

Bayes nets: understanding the best newest thing

| By Steven Struhl

snapshot

In the first of a two-part series, Steven Struhl explains what Bayes nets are and why researchers should care about them.

quirks.com/articles ID 20130306

Just when we were starting to feel comfortable with our state of confusion about statistics, another remarkably powerful set of analytical methods with new rules has appeared. They are variously called Bayes nets, Bayesian networks, Bayesian belief networks and probabilistic structural equations – and generally, computational tools to model uncertainty.

Importantly for us, they work in many practical applications and often work better than other methods.

Bayes nets can quickly focus on important variables, show how variables are connected, what the importances of variables are with terrific accuracy and build models with strong predictive power. They even bring us closer to what may approximate the Holy Grail in research: showing clear linkages between survey data and market share.

Bayes nets have many remarkable capabilities and, inevitably and unfortunately, some new terminology. We will need two installments to cover their basic functions and to give some examples of how they work. In this month's article we cover some background, including what Bayes nets do and what makes a Bayes net Bayesian. We will touch on some of the ground rules and then discuss the central concept of conditional probability.

To show how conditional probability can solve problems that really elude us intuitively, we will see how reliable a witness actually is when he says he saw an accident. Then we will solve the famous (or infamous) Monty Hall *Let's Make a Deal* problem in which you will get to decide whether to stick with the door you chose or switch to a different one. The answers will surprise you!

We will round out this installment with some more basics, discussing networks and the value of information, and finally will compare networks with regressions.

In the next installment we will get to the examples, showing the remarkable powers of these networks in practical applications. We will first show how a network automatically found logical and informative patterns of relationships in questions from a typical big, messy questionnaire. We will conclude with a network linking questionnaire questions to market share with over 70 percent correct prediction levels. This example strongly suggests that Bayes nets may well be the next new thing, greatly expanding our ability to understand variables and their effects.

Have proven themselves

Networks are new to research and the social sciences but they have they have proven themselves in many other fields. They have served for years as reliable and valuable additions to the analytical armamentarium. So the bugs have been worked out and there are a host of highly useful applications. Work that was directly applicable to the development of Bayes nets goes back at least to the 1940s. Judea Pearl's *Probabilistic Reasoning in Intelligent Systems: Networks of Plausible Inference*, which discusses principles that underlie these nets, dates back to 1988.

A network can be simple, like the example in Figure 1, which shows the relationship of cancer, bronchitis and abnormal X-rays. (Set as it is, it shows what we can expect in the other areas if a person has bronchitis.) Networks can

Figure 1

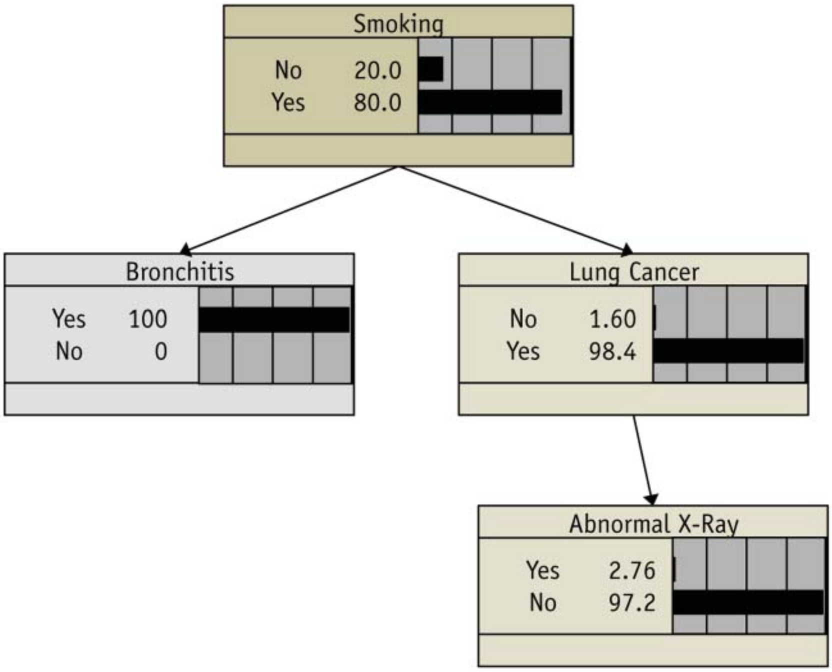
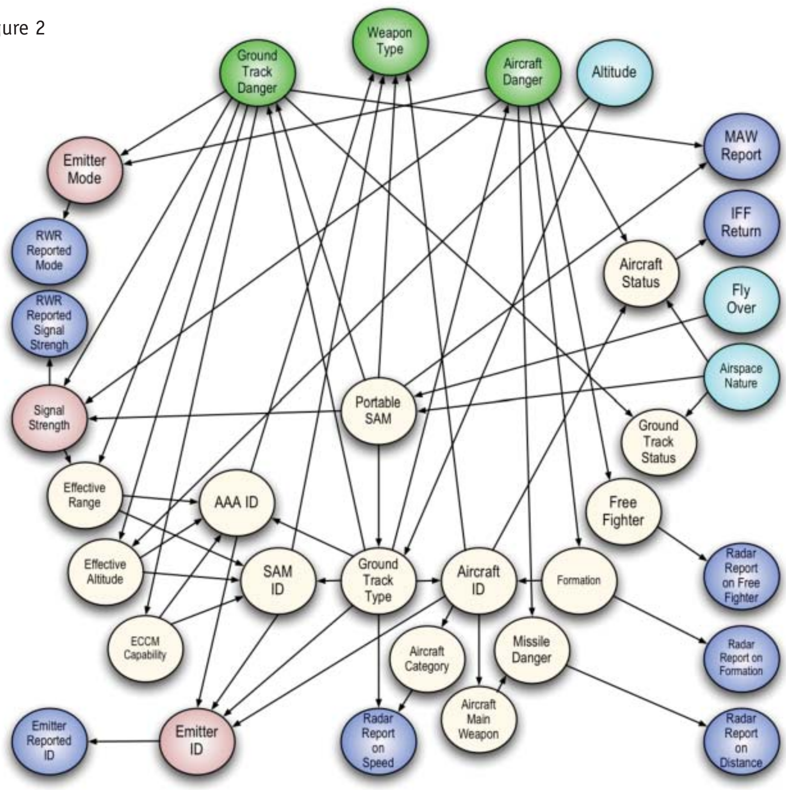


Figure 2



become so complex that reading them becomes quite difficult. Figure 2 is one that is nearly unintelligible, but that still works. It has a genuinely serious application, namely deciding whether to launch a missle. This at least should give us some confidence that these networks are in fact (and not just in metaphor) battle-tested.

Bayes nets are a powerful and flexible set of approaches that can solve many problems. The variety of uses can range from brainstorming to highly sophisticated modeling and forecasting systems. Here are some applications:

- automatically finding meaningful patterns and connections among variables;
- getting accurate measures of variable strengths (for drivers analysis);
- screening large numbers of variables quickly (for data mining);
- linking questionnaire data to data from the outside world, such as market share;
- developing models of cause and effect (in the right circumstances); and
- incorporating expert judgment into data-driven models.

Everything Bayesian refers back to the work of the Rev. Thomas Bayes, who lived an apparently quiet life in Tunbridge Wells, England, in the 18th century. He published two books in the 1730s, but never the "Bayes' theorem" that bears his name.

Bayes' formulation itself is simple. We should add that he never called it a theorem and that any reasonably literate person could easily understand it in its entirety, aside from what one writer[1] astutely calls the "goggle-making" formulation often used to represent it. Starting from Bayes' straightforward assertion and arriving at many of the types of analyses that bear his name likely would have caused the good reverend to take on a strange hue.

We can formulate Bayes' idea in a variety of ways. Let's start with this more practical formulation:

We start with "prior" (existing) beliefs and we can update or modify these by using information on likelihoods which we get from data we observe. Adding this information gives us a new and more accurate "posterior" estimate. From this posterior estimate, we draw conclusions.

That's really all there is to it.

However, it is usual to encounter this formulation, which can indeed make many readers' eyes goggle:

$$P(B_i|A) = P(A|B_i)P(B_i)/\sum_i\{P(B_i)P(A|B_i)\}$$

Yet this notation simply reflects what we said in the modest paragraph above.

The Bayesian approach also includes

the idea of conditional probability. This phrase appears prominently in many discussions. However, a probability that is conditional on the data is no more than what we just described: an estimate of probability that is revised based on including information from data into some prior estimate or belief.

The ground rules for networks

Diagrams of variables are key. A Bayes net calculates relationships among variables and shows how they fit together. A diagram of how variables relate to each other therefore is integral. Somewhat more formally, these networks are based on graph theory and on probability theory – so grasping their workings requires both a diagram and calculations with it.

Looking at a network, you will see a familiar type of diagram, if you have experience with structural equation models (SEMs) or with partial least squares (PLS) regression path models. Variables are connected with arrows, or arcs, showing pathways between them and these lead to target variables.

Directions are important. In a Bayes net, there must be directions between the variables and there cannot be any circular or cyclic pathways where a variable points back to itself. This is why these networks are sometimes called directed acyclic diagrams – or, as you may encounter in the literature, DAGs.

The arrows or arcs have a specific meaning in these diagrams. However, this is largely intuitive. A variable at the start of an arrow leads to another variable and in certain conditions we even can say that the starting variable causes the variable at the end. Arrows can lead to or from a target variable.

Terms and phrases: It's all in the family. There is of course some terminology to learn (Figure 3). Fortunately, much of this too is largely intuitive and rather uncharacteristically warm-and-fuzzy for statistics.

Figure 3

- The variable at the start of an arrow is called a parent.
- The variable at the end is called a child of the parent.
- Children can have several parents and parents can have several children.
- If there are two or more parents, they are called spouses.
- A parent of a parent is a grandparent and so on.
- Variables are dependent only if they are directly connected. Children and parents are dependent on each other. Children are independent of grandparents and other variables further away.

Whether variables are dependent on each other becomes important when screening variables for inclusion in a model. One powerful screening technique is to include only those variables that are dependent on the target variable (its parents and children) and the other parents of any children. Closely-connected variables have stronger effects, so this quickly eliminates less-important variables where there are many – as in data mining applications. This set of variables has a name also: the Markov blanket. (How Mr. Markov enters consideration is something to talk about another time.)

Related to whether variables are dependent, there is another item of terminology that you may encounter. The variables have "edges" that go with the arrows. The edge of a child node points toward a parent node.

Everything is connected: Changes move through the whole network. Regardless of dependencies, all variables in a network change when one changes. This sometimes is described as "information propagating through the network." The whole network is connected. And indeed, as we will soon see, understanding networks as conveying information is critical to their practical applications.

This connectedness throughout the network also makes estimates of variables' importances much more powerful and accurate than those we can get from regression-based models. Using regressions, we need to assume that when we change one variable, all others remain constant. This can happen if we set up an experiment but with real-world data, this is hardly ever the case.

However, with a Bayes net, any effect we see takes into account all the connections to all the other variables. We are considering the entire system when we measure any effects.

Network-building ranges from simple to complex. As follows, when we are modeling relationships among variables, our choices in how the network gets put together are of prime importance. There are many, many ways to get a network assembled automatically. At their simplest, there are methods in which all variables get fit directly to the target variable as well as possible. This is very much like a regression where all variables are put in without screening to see which ones belong.

Networks at their most complex result from countless attempts to fit the data – finding how variables best fit together to predict or explain the target variable. These methods use sophisticated tests to ensure that the network does not seize upon a connection that is good "locally" (where a variable is being added) but not

Figure 4

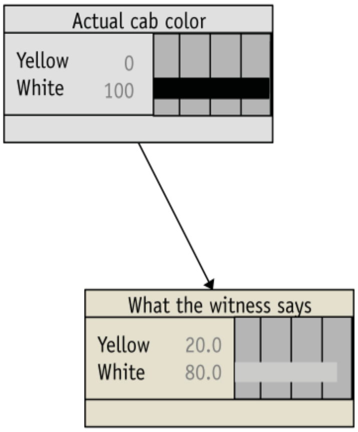


Figure 5

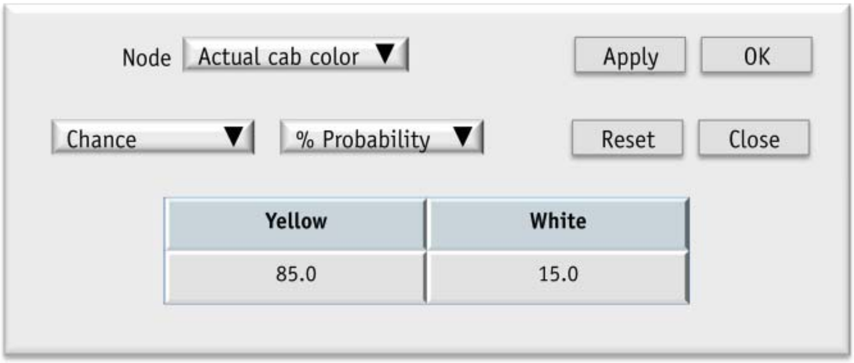
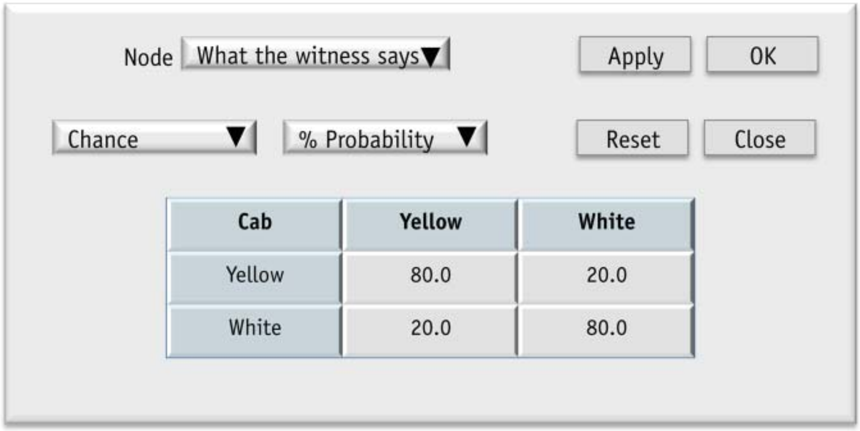


Figure 6



good for the overall network.

Did somebody say we can figure out causality? Finally, we did mention that we can, at times, see whether one variable actually causes another. The idea of finding causality in networks is quite intriguing. However, when we build a network from the data we typically use, we often discover that some arrows work as well in either direction. These directions are "equivalencies" and we must decide how the arrows point.

Only if an arrow must point in one direction can we say that one variable causes another. There are tests that determine this. Unfortunately, rarely does the data we find in surveys have completely definite directions among the variables.

Conditional probabilities

Bayes nets involve conditional probabilities, which in practical terms means how the distribution of values in each variable fits with the distribution of values in other variables.

More practically, networks can solve problems quickly that are difficult or elusive to solve using other methods. The workings of conditional probability can be difficult to envision, so hold on and we will try two small examples: the yellow taxi-white taxi problem and the "three-door" Monty Hall problem.

Yellow taxi-white taxi

There is an accident involving a taxicab. A witness reports that the cab involved was white. In this city, 85 percent of cabs are yellow and 15 percent are white. The police actually test the witness out on a street corner and find that he is 80 percent accurate at getting the cab's color.

What are the odds that the cab actually was white? We can solve this with a simple Bayes net[2].

Setting up the taxicab problem is simple. Recall that we can make a network ourselves by linking up variables, just as we can create a network from a data file. Here we will form the network by linking two events: the color of the cab and what the witness reports as the color. Each event is called a node.

We understand that the actual color of the cab leads to what the witness reports as its color so we will draw a small network with the color of the cab leading to what the witness reports (Figure 4).

First we set up the node showing the odds of a taxicab being yellow (Figure 5). Next we set up the second node showing the odds of the witness being right about each type of cab (Figure 6).

Now what happens when the witness says he definitely saw a white cab? In the diagram, we will change the value of "What the witness says" to 100 percent for white. Since cab color and what the witness says are linked (as we showed in the diagram), if we change the value of one node, the other will change along with it. So even though the arrow points from cab to witness, if we change the value for "witness" we will see the change flow back to the likelihood of the cab being a given color.

This is a basic property of networks. All variables are connected so that all change when any one changes. This keeps their defined "joint probabilities" in line.

Now for the surprising answer. The bars to the right in Figure 7 allow us to manipulate the levels for the witness or

Figure 7

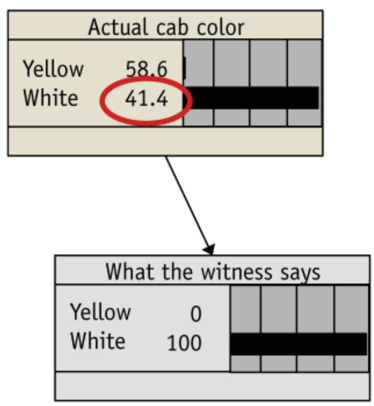


Figure 8

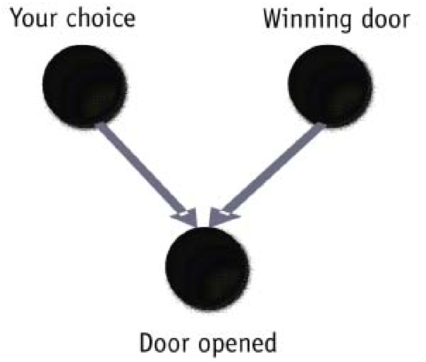
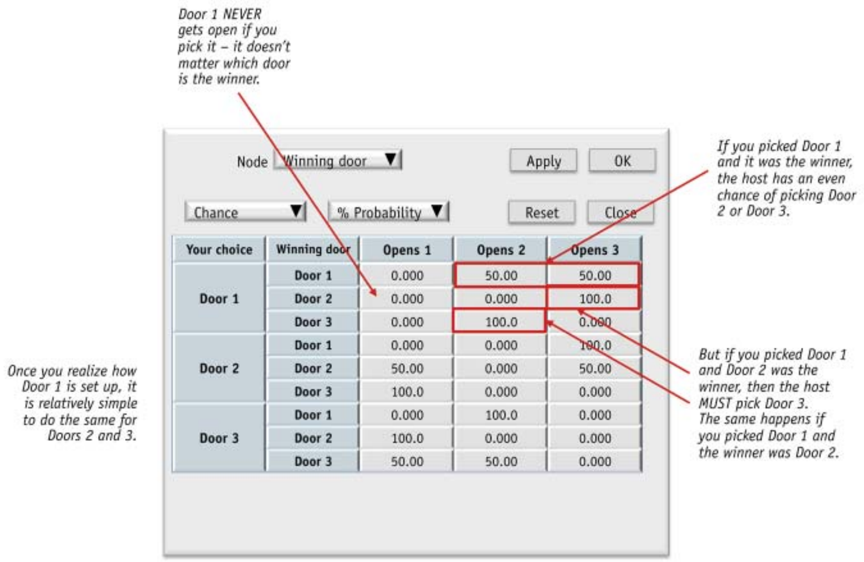


Figure 9

Figure 10



Your choice	Winning door	Opens 1	Opens 2	Opens 3
Door 1	Door 1	0.000	50.00	50.00
	Door 2	0.000	0.000	100.0
	Door 3	0.000	100.0	0.000
Door 2	Door 1	0.000	0.000	100.0
	Door 2	50.00	0.000	50.00
	Door 3	100.0	0.000	0.000
Door 3	Door 1	0.000	100.0	0.000
	Door 2	100.0	0.000	0.000
	Door 3	50.00	50.00	0.000

the cab. We set "white" in the witness node to be 100 percent. That is, this corresponds to the witness saying the cab is white. The node takes on a gray color to signal that we have changed it.

As we can see, the odds of the cab actually being white are about 41.4 percent, given that 85 percent of cabs are yellow and the witness is 80 percent right in identifying colors.

We have just come upon something difficult about Bayes nets. We have neatly and simply solved a problem that would have eluded most of us. And yet the correct answer seems strange. This is a difficulty we have with conditional probability. As Yudkowsky[3] aptly puts it: "Bayesian reasoning is very counterintuitive."

In sum, we have an approach that is powerful and hard to work out in our heads.

The three-door Monty Hall problem

This is a classic that has generated numerous arguments among scientists, statisticians, random onlookers and fans/foes of *Parade* magazine puzzle columnist Marilyn vos Savant. Here's the problem:

There is a prize behind one of three doors. You pick a door. The sneaky game host does not tell you whether your door has won. Instead, he opens another door where there is NO prize. Then he asks whether you would rather switch doors OR stay with your door.

What do you do?

A statistician has shown on the Web how he nearly got this right by setting up 10,000 simulation runs in SPSS[4]. We will solve it with a simple three-node network.

Setting up is critical. First we have two independent events (Figure 8): the door you pick and the door that wins. However, the door that is opened depends on both your choice and the winner.

So these two independent events are now linked by the event of the door being opened (it depends on both of them). Each of the independent events has a probability of 33 percent for each door. This part is very straightforward (Figure 9).

Now on to the key: which door gets opened, based on which one you have chosen. This is going to take some thinking and, echoing Mr. Yudkowsky above, this part is not completely intuitive.

We have made a table (Figure 10) showing what happens with your choice and which door wins. Here goes. The table starts by saying you could choose Door 1, Door 2 or Door 3. For each of your choices, the winner could be any of the doors. So we have Doors 1, 2 and 3 within each of the three doors as the headers for the rows.

Now we have to cross these rows with which door gets opened. So

Figure 11

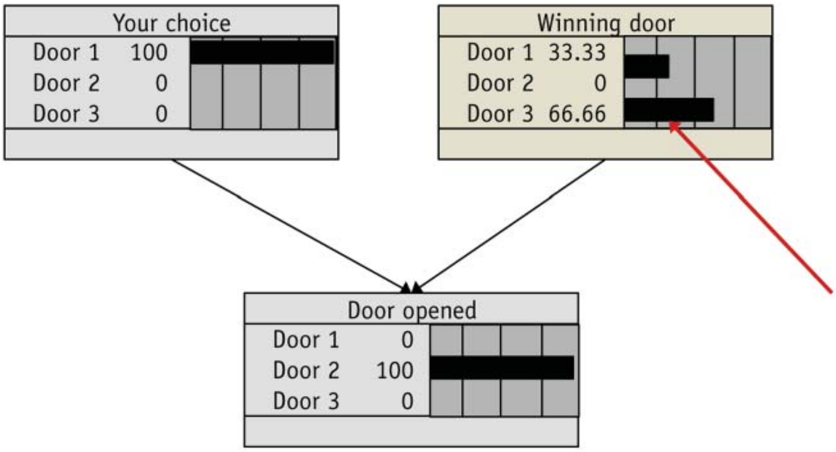
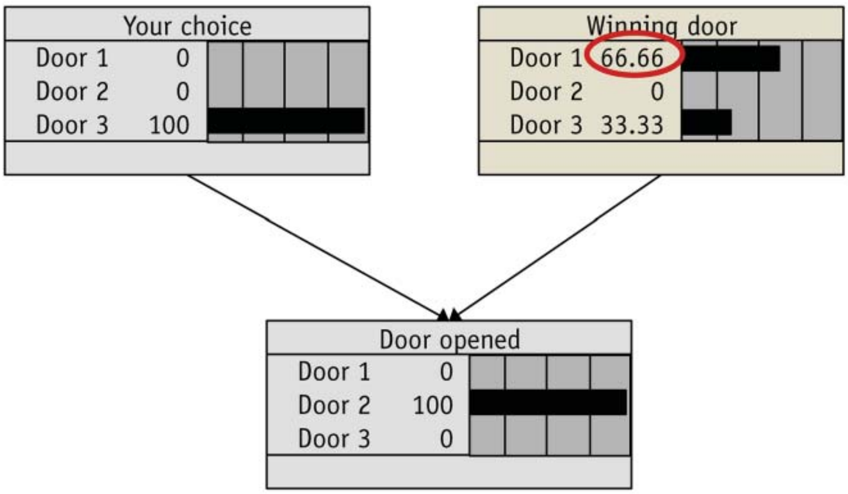


Figure 12



at the top of the table, the column headers are "Opens 1," "Opens 2" and "Opens 3." We now start to see some surprising relationships.

Right away we can see that the odds of any door getting opened do not match. Just looking at this table, it seems lopsided – not what we would expect if the chances are even. A table with even chances would look completely symmetrical.

Anyhow, the (perhaps not) surprising answer to the three-door problem: You should switch!

The diagram in Figure 11 may take a little explaining but it shows the result. In it, we have moved your choice to "Door 1." Now Door 1 cannot be the one opened so the sneaky host opens Door 2. The bar in "Door opened" gets moved to reflect that. "Your choice" and "Door opened" have taken on a grayish color to show that they are being changed.

Not only should you switch but the odds favor you switching by 2:1 (66.6 percent for Door 1 vs. 33.3 percent for staying with your door). The red arrow points to the door with the best odds of having the prize – namely, the other door.

Now just to confirm that this is not a fluke, we change the doors (Figure 12). Now you choose Door 3 and the host opens Door 2. Once again, the odds favor a switch: 66.6 percent to 33.3 percent for staying.

If this seems confusing, if not impossible, you are in good company. About 10,000 people wrote to Marilyn vos Savant when she published the correct answer saying she was wrong. About 1,000 of those people had doctorates.

As we said above, the conditional logic used in networks is extremely powerful but not always intuitive, even if it gets the correct answer quickly.

To review, what tends to trick us is that the actions of the host have caused a link between two events that are otherwise independent. Now we see two points: these events are connected and the choice the host makes connects them. We then can understand how change will flow through when one of the events changes.

From the perspective of looking at a network, changes in probability must propagate (flow) through the network regardless of the way the arrows point.

May pose problems

Networks can use standard statistical tests to determine structure but these tests may pose problems. In fact, many problems related to networks are called "hard" in statistical language. Sometimes you will see the term "NP-hard" (which also may describe the reading that follows). Practically speaking, NP-hard problems can be insoluble – and that definitely would slow down your work.

In a network, if we rely on tests of significance, it is often difficult to choose the appropriate tests and good thresholds for those tests, because relationships can be numerous and highly complex. We also might be forced to reduce the number of statistical tests or reduce the number of variables processed, in an attempt to increase the tests' reliability.

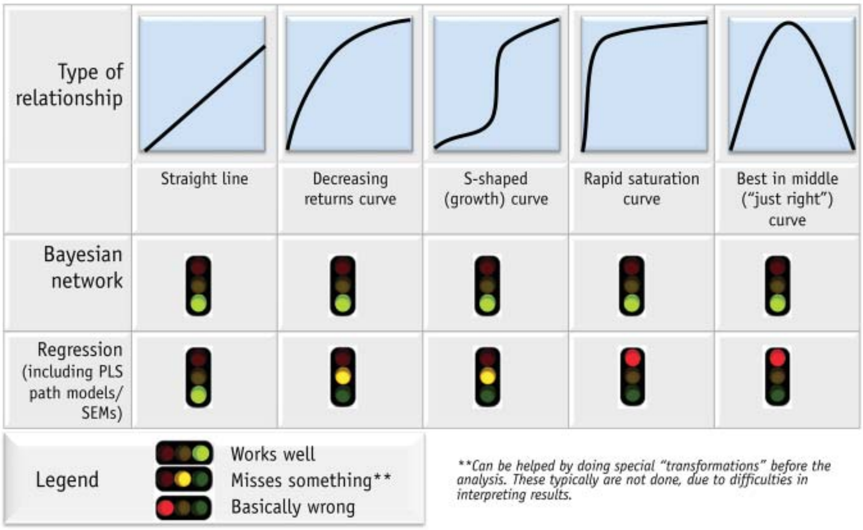
Networks gain more power if they use "value of information" as a basis for understanding structure. Information has value inversely proportional to its probability. That is, describing high-probability events has low information. Alternatively, high levels of information consist of describing low-probability events accurately.

This is not statistics as we have known it. Rather, testing balances the value of information vs. the length of description in machine language.

As you read about networks, you will encounter the minimum description length (MDL) principle. It is based on the idea that any regularity in a data set can be used to compress the data – to describe it "using fewer symbols than needed to describe the data literally."[5]

Therefore, the best explanation is the one that minimizes description length while conveying the most

Figure 13



information. As a general practice, information theory has sought to keep the cost of describing the data equal to or less than the value of the information in the data.

This is an excellent idea with very large data sets. There is plenty of data and it makes sense to balance how much information we gain precisely against how much effort it takes to describe that information. Using survey data and typical sample sizes though, we may need to explore different ratios of description vs. information to see patterns clearly.

May seem puzzling

Regressions are equivalent to a "naïve Bayesian" network. In a naïve Bayesian network all the variance in the target variable is portioned out to the dependent variables. And indeed, this is just what happens in a regression. This may seem puzzling (is this becoming a refrain?) but one way to describe the independent variables in a regression is as explaining the dependent. That is, each independent variable accounts for some of the variance or pattern in the dependent variable.

We have become accustomed to talking about the independent variables as predicting or driving the independent. However, if we think of the coefficients in a regression, we can see that each independent variable actually makes up some part of the total value of the dependent variable. We sum up the contribution of each variable times its coefficient and that total is the predicted value of the dependent.

Bayes nets of course differ from regression in important ways. Regressions are supposed to use continuous dependent variables (or with logistic regression, binary ones). Bayes nets were developed for use with discrete (categorical) variables. Many programs that create and analyze networks still only can handle variables of this type.

However, in recent years, networks have been extended and now can analyze continuous variables as well. The math involved is very abstruse indeed – but it works.

Regressions are supposed to have straight-line relationships among variables. This means all relationships, not only between the dependent and the independents but among all the independent variables as well. Bayes nets can handle any regular relationship between variables, whether it is linear or not. Figure 13 shows where each method is relatively likely to find success.

Find logical patterns

Next month we will return with two remarkable examples of the practical uses of Bayes nets, showing how they find logical patterns even in messy data, and then giving an example of how they linked survey questions to market share with remarkable predictive activity. In short, we will see two demonstrations that show just how these nets may be the "best newest thing" in understanding data. Stay tuned.

Steven Struhl is principal at SMS Research Analysis, Philadelphia. He can be reached at smstruhl@gmail.com.

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[1] Stanners, W. (1999). "Essay on Bayes," *Game Theory and Information*.

[2] Thanks to Lionel Jouffe for this example.

[3] http://yudkowsky.net/rational/bayes

[4] http://www.uvm.edu/~dhowell/StatPages/More_Stuff/ThreeDoor.html

[5] Perhaps the definitive work on this is Grünwald, P. (2007) *The Minimum Description Length Principle* (Cambridge, Mass.: MIT Press). That's all we can say about it in this article.

••• pharmaceutical research

Procuring a problem?

The rise – and pitfalls – of preferred vendor lists

| By Laura M. Cusumano

snapshot

As preferred vendor lists grow in popularity, we need to ask: Are they causing more headaches than they were intended to solve?

A trend has developed over the past 10+ years of larger pharmaceutical marketing research organizations (MROs) moving to preferred vendor lists (PVLs). Generally, the initiation of PVLs has been driven by the procurement departments in these companies, with the broad goals of reducing costs and/or increasing the value of the current spend. MROs presented an easy target, being – in theory at least – a cost center spending millions with little or no oversight outside of marketing. MROs pushed back, viewing the role of procurement as best applied to goods (e.g., office equipment) or clearly-defined services (e.g., maintenance of HVAC). However, some of the pushback by marketing research was no doubt misinterpreted as an attempt to protect favorite vendors or simply to maintain full control of vendor selection. It is easy to imagine that procurement and MROs did not start off on the right foot or understand each other's objectives clearly.

A way of life

PVLs and procurement are now a way of life in large pharmaceutical companies, with no going back to the good old days. It is generally accepted that the goals for PVL are to: reduce costs and/or increase value; set a vendor-quality standard; reduce the complexity of commissioning research; and assure that the company is dealing with reputable, financially-sound vendors.

Ideally, the procurement processes are intended to create the best-possible value and secure services of the required quality at the lowest available cost. However, as the process becomes more complex and the outcome more restrictive, these objectives may not be met – resulting in reduced quality and more complex processes, requiring time and effort from both the MRO and the marketing research vendor (MRV). Some preferred-vendor applications have over 100 questions and require copies of résumés of all staff in addition to the financial information.

Despite the significant value PVLs may provide an organization, the protracted process and lists are not without their limitations and prob-

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lems. Some pharma companies are more effective than others in minimizing the negative side effects of PVLs. It takes a conscientious effort to create and maintain a PVL that really works for the organization without a negative impact or labor-intensive process.

Some PVLs are more like guidelines instead of mandates. The companies with more-relaxed PVLs generally allow a set percent of spend with companies not on the list, if there is adequate justification provided. They also tend to have longer lists. Procurement generally assists and oversees but does not generally take the full leadership role.

At the other extreme, some PVLs are directed by or managed with procurement. These tightly-controlled PVLs and the process to create them can include and/or result in:

- A limited choice of vendors based on a specific type of research. For example, the company may identify two marketing research vendors to conduct all of the pricing research for the organization.
- Extensive application processes to be considered for the PVL, which are demanding for both the company and the vendor.
- Detailed documented processes on issuing requests for proposal (RFPs).
- Limits in the interaction between the company contact and vendor during the commissioning of research.
- Specific formats for proposals to be submitted.
- Required rebates from vendors on total annual spends by the client company.
- Unfavorable terms for payment (e.g., 90 days), which can be crippling for smaller firms.
- Suppliers paying a fee to be screened and included on a preferred vendor list.

Have side effects

It is universally agreed that the best intentions do not always result in the best outcomes. Some of the intended goals and processes established for PVLs have side effects (Table 1) that can actually reduce value and increase complexity.

Other issues surface in the process of establishing and maintaining PVLs. They can be addressed if an MRO and its procurement team are sensitive and prepared to troubleshoot potential issues. Some of the more common pitfalls include the following.

Not all marketing research services and skills are created equal. This is the most legitimate argument for minimizing a procurement or strict PVL approach. Even if the sample size, target audience, methodology and vendor experience sets are exactly the same, comparing marketing research services is not like comparing apples to apples. There will always be differences between market research vendors, their processes and deliverables. For example:

- Independent of years of experience and training, moderators have different skills and levels of expertise.
- Some MRVs offer proprietary methodologies or unusual databases/respondent panels that they have developed and manage.
- MRVs vary with regard to their skills in managing the research process. There is always a chance of something not going as planned, especially in global research. Some MRVs can handle problems and issues smoothly and quickly without disrupting the process or incurring costs, either because they have a broader range and more and deeper experience support staff or they are tuned in to preventing/managing problems early and quickly.
- Some MRVs are simply more creative with techniques, more flexible, easier to work with or have better presentation skills, can establish rapport and credibility with the brand team faster and/or demonstrate closer attention to detail.

Frequency of updating preferred vendor lists. In most industries, the preferred vendor list is revisited every two to three years. This enables a vendor to demonstrate performance and value in a reasonable amount of time, allowing for the development of an intimate understanding of the client's needs. It also allows a vendor to demonstrate improvement as the research and relationship develop. However, many pharmaceutical companies revise their PVLs every year. This is a very short performance-measurement period for the limited services provided. In addition, updating a PVL requires a significant amount of time both by the client company and the MRVs, which can be a distraction from meeting the business needs. This time required by MRVs ultimately costs the pharma company because the professional time required.

Table 1

Intended Goal	Possible Side Effect
Reduce costs	Additional time required from procurement, MRO and MRV to create, communicate, complete, revise, manage and maintain.
Secure highest quality	Some vendors are stretched too thin and are hesitant to say they are too busy for risk of losing their PVL status. Smaller, possibly more creative and customer-intimate MRVs may not be able to secure a place on the PVL because they offer limited services or cannot secure critical mass.
Reduce number of MRVs	Fewer vendors may reduce the competitive nature of the MRVs in delivering the best value to an MRO. In addition, cost-competitiveness may be impacted over time, especially with PVLs that limit the number of MRVs by type of service (e.g., three vendors for pricing research).

Number of companies on the preferred vendor list. There is no magic number for the ideal number of vendors on the PVL. The optimal number is different for every company, and it should broadly reflect the: number of brands and therapy areas in which the company is actively involved; distribution of the stages of the product life cycle the brands reflect; number of marketing-research managers commissioning research; and total marketing research spend.

For example, if all of the supported brands fall into three therapy areas, or if only six brands are actively supported, or if the company's total spend is $2 million, then the PVL is likely to be relatively short. However, if the company has a diverse product line, an active pipeline, a $20 million market research budget and 15 market research managers, then the PVL list will have to be significantly longer.

Ways to optimize

So what are some ways to optimize PVLs? Following are some strategies:

Ensure adequate choice among vendors. No matter the company's situation, marketing research managers should feel comfortable that they have sufficient choice in vendor selection and they will want to avoid dependence on too few vendors. There are various reasons it is risky to have a PVL that is too short for an organization:

- Vendors may be too busy to take on all projects sent by a client company, which may compromise quality or wreak havoc with deadlines. It is very difficult for a MRV on a PVL to refuse work because they are too busy or because they are not comfortable conducting a project.
- Market research managers within the same company may be competing for MRVs.
- Working with only one or two vendors may eventually create a research bias or a stale approach.

Provide the option of going off the PVL. There MUST be an option for marketing research managers to go off the PVL list to either explore new vendors or meet an immediate or unique research need. If a company sets up a PVL, there should be an opportunity for experimentation with vendors who have not yet secured a place on the PVL. Too many restrictions may limit a pharma company's access to new methodologies, approaches or marketing research professionals. However, it is important for companies to limit off-list vendor use for the benefits of the list to be realized. A broader vendor base may provide expanded experiences and educational opportunities and support a company's success.

Valuable and effective

Do PVLs really save money and improve research quality? No doubt, certain aspects of PVLs are valuable and effective but a look back over the past 10 years shows little to support a highly-restrictive PVL. Would MROs have fared better by simply reducing or capping spend, sharing best-practices and letting the free-market forces balance it out? Hard to say. But the continued expansion and complexity of PVLs warrants a critical eye, because the benefits are challenging to identify and even more difficult to measure.

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Seeking that (hypodermic) needle in a haystack

Tips to make difficult medical recruiting easy

| By Chris Lee

snapshot

To keep clients happy – and profits intact – medical recruiters need a full understanding of the study and respondent parameters with which they're dealing. A bit of Google-searching is often just what the doctor ordered.

As the world has evolved to communication via the Internet and e-mail, the job of recruiting market research respondents has also evolved. Pre-registered market research panel members for every category conceivable have made recruiting for studies quicker and more predictable. Unfortunately it has its limits, particularly when rare types of respondents are required.

The medical industry is one of the most complex and challenging categories for which to recruit market research respondents. Due to highly specialized medical professionals and oftentimes extremely rare patient conditions, it is not as simple as blasting out e-mails to a panel to fill your quotas.

The panels of recruiting companies are filled with the more common medical professional titles and patient conditions because this is where the money is for them. Less-common specialties and patient conditions often need to be recruited via phone, support groups and other more challenging methods.


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An Open Letter to the Research Community,

Often I get asked why we call Precision Opinion "The Most Trusted Name in Market Research®." My response is "We don't ... our clients do."

Precision Opinion proudly earned that moniker by refusing to accept the status quo from our suppliers. You see, after leaving the corporate world of Procter & Gamble and Mattel, I "hung out my shingle" as a marketing and research consultant to the tourism and gaming industry. My goal, as with most in our business, was to provide insightful discoveries to my clients. In doing so I grew increasingly disenchanted with outside field services and their inability to conform to requirements. I guess you can say that a lack of trust and frustration was our true beginning.

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Jim

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Even with a sizable panel available, the screening requirements may be significant enough that you find out after the job starts that you need to spend more money and find another way to recruit.

Even worse, you may think a panel is available and the screener is reasonable, only to find out that the condition is only treated by a small subspecialty of physicians and you now have no chance of reaching the client's quota.

I can't tell you how many times a client has started a conversation by saying something such as "We just need doctors who treat this very rare medical condition and, by the way, they need to be published authors, work only in large group practices at a prestigious hospital, treat 1,000 patients per month, have green eyes and be able to juggle with one hand … AND we have never had trouble in the past recruiting them."

Look out! There go your profits falling off a cliff…

Should you just walk away from a difficult project like this? What if this is a key client you have been trying to work with for a long time? Do you take a chance and just hope for the best?

Is it even possible to feel comfortable bidding on this type of medical project? How do you know when a job is worth it and when to take a pass?

So let's assume you don't yet have a good understanding of the disease, the medical professionals involved, the percentage of respondents who will qualify for the project and whether an existing panel can achieve the quotas needed. There is no way you should take on this job – or is there?

Several key methods

Guaranteeing project success in these situations is impossible but there are definitely several key methods to make sure you: understand what you are getting yourself into; set client expectations accordingly and; most importantly, price the project to ensure it is profitable.

Research. The first and most important task is to learn more about the disease. Two minutes of Googling can uncover a great deal about it. I always start by Googling the name of the disease and incidence per 100,000. For example, "hemophilia incidence per 100,000." This is a standard method the medical community uses to gauge the disease incidence in the general population.

Any time the condition is less than 100 per 100,000 you are dealing with a rare disease. Anything under 20 per 100,000 is extremely rare. Now, here is the interesting part. I find that this number strongly correlates to the highest number of patient recruits you can achieve for the disease. For example, myocardial infarction (heart attack) has an incidence of 274 per 100,000. Check around with recruiting companies and the range of recruits they can achieve is typically 250-300. On the other hand, hemophilia has an incidence of 20 per 100,000. Guess what: Most of their panels can't support quotas higher than 20. This gives you a starting point to what is possible.

Understanding physician specialties. Often the specialty of the physician is far less obvious than you think. For example, you have a big asthma study so you think you will just target pulmonologists (lung specialists), right? Yes, but nearly every intensive-care unit physician is also a trained pulmonologist. It doesn't seem obvious that a doctor working in an ICU is a target for this study but many also have private practices where they practice only pulmonology.

Using the hemophilia example again, hematologists are the specialty that would treat a rare blood disorder like hemophilia but this is a somewhat common example of a rare disease that has special treatment centers designed specifically for this disease. There are only 134 hemophilia centers nationwide and about 277 physicians total who regularly treat hemophilia – roughly 12 percent of all the hematologists in the U.S. So targeting hematologists in general would be an ineffective strategy. In fact, you could easily find yourself way below your target quota. It is always fun to tell a client you won't get close to meeting their quotas, right?

So how do you avoid these types of mistakes? The American Medical Association maintains a list of all specialties and subspecialties along with counts of how many there are in the U.S. You can easily Google to find a copy of this information. A copy of this list is an invaluable reference tool!

Googling "who treats asthma or hemophilia" or variations of this can also be helpful but typically won't uncover the fact that critical-care medicine or hemophilia specialists are what you need. I find instead that if you Google "hemophilia treatment center" you will then be able to find some Web sites of the actual centers so that you can review which physicians are managing the disease and how the disease is managed in more detail. By reviewing a few of these centers' sites, it becomes much less likely that you will overlook the actual specialty or subspecialty of the physician you need. You might even find out how many centers treat the disease nationally.

Calculating screener incidence. Of all the details that can make a good (read: profitable) job go bad, it is incorrectly

Research Company Spotlight - Medical Interviewing

Below is a list of firms from our Researcher SourceBook™ specializing in medical interviewing.

4Sight Market Research » SEE AD p. 42
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www.4sightmarketresearch.com

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847-390-7777
www.accurdata.com

Adelman Research Group
A SurveyService Company
800-507-7969
www.surveyservice.com

Advanced Focus
212-217-2000
www.advancedfocus.com

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

Beta Research Corporation
516-935-3800
www.BetaResearch.com

Communications for Research » SEE AD p. 36
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www.cfrinc.com

The Dominion Group
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Fieldwork Boston, Inc. » SEE AD back cover
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gauging how many people will qualify for the project. If the client's statement "We never have had trouble with this in the past" can send a chill down your spine, a client saying "Just estimate 70 percent will qualify and we can see how it goes" can be even more dangerous. I have rarely seen the percent of respondents that qualify to a study to be higher than expected. It is usually lower – sometimes much lower; sometimes non-existent.

The challenge of course is that you often find this issue out after a week of significant recruiting effort and by that time the schedule is running out of time, your client is frustrated and you look like an amateur.

So how do you solve this issue? Unfortunately this one can't be solved but it can be managed. It is impossible to be an expert on all the nuances of medical professionals and those they treat. I have worked in medical market research for 20 years now and still am learning new facts. For example, off the top of your head, guess the answer to this common screening question: What percent of physicians are hospital-based? Drumroll please: 10 percent.

I am guessing you overestimated, maybe by a lot. How could this be? Well, first, the term "hospital-based" is not very well-defined. Do we mean their office is in the hospital? That they are employed by the hospital? Or, do they just need to spend a lot of time at the hospital? The definition that physicians typically use (the one that counts here) is whether they are employed by the hospital. The definition your client has may be something very different.

The point with this example is that screener questions are sometimes not as simple as they appear. Taking a few extra minutes to think through how the question might be misinterpreted can save you a lot of headaches (and money).

Another screener question that can cause a lot of issues is the one in which the patient has to be taking a certain medication or the physician has to be prescribing a certain volume of a medication. Clients generally provide a good guess based on market share figures to predict this incidence percentage but this has the possibility of being quite a bit different than the actual percentage who screen in to the study. Even worse, the client doesn't know and just asks you to price assuming "most will qualify."

The first and most important strategy here is to create some caveats. For example, you can price this one for, say, a 70 percent qualifying incidence but point out contingency plans. If the incidence falls below 50 percent, this means we might have to increase the cost-per-recruit by $25. This won't help you avoid an unpleasant conversation if this in fact does happen but you have set the client's expectation (hopefully!) so that this scenario should not be a surprise to them.

The second strategy here is to do your own research. Although it is not easy to find actual figures of how many people use the medication, you can usually find out how many people have the condition in question and you often can determine whether the medication in question is the market leader, a newer drug or an older drug falling out of favor. This information can help you roughly estimate how much volume exists for the drug. Not a perfect solution but it is likely to help get you in the right ballpark for the estimate.

Make a huge difference

All of these suggestions should only take minutes at the point of bidding or launching a new job but the time and cost savings these tips will provide should make a huge difference to you and your client. So the next time a client overestimates how easy a difficult medical recruit will be, hopefully you'll be armed with the information you need to make your difficult medical recruit easy.

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Why choose Columbus as a Midwestern market over Chicago or other Midwest markets for marketing research studies? This can be answered in three parts: the city, the team, and the facility.

First, the city: Columbus, the capital of Ohio, is the largest city in Ohio and the 15th largest city in the United States. It is the Midwest's third fastest growing major metropolitan area with increasing demographic and cultural diversity.

Columbus is headquarters for many large corporations, including Wendy's International, Cardinal Health, Nationwide, The Limited, Victoria's Secret, American Electric Power, Big Lots, White Castle System, Bath & Body Works, and White Barn Candle Co., which helps provide depth in the types of industries represented in the employment base.

When it comes to politics, Columbus is a far more politically balanced market vs. Chicago (according to The Bay Area Center for Voting Research: The Most Conservative and Liberal Cities in the U.S.. Chicago has 18.72% Conservative percent of total vote and 81.28% Liberal percent of total vote compared to Columbus' 37.65 Conservative percent of total and 62.35 Liberal percent of total vote.)

Also, when viewing the Census.gov 2000 census information about educational attainment, the Midwest region's percent of those having a high school diploma or higher is 83.5%. Illinois has only 81.4% versus Ohio's 83.0%.

A major contributing factor to the higher educational attainment percentages is The Ohio State University main campus (boasting one of the largest enrollments of all colleges in the country), making Columbus a perfect choice to find "typical" Midwest marketing research respondents!

Next, the team: market research is only as good as the company that does the data collection! Complete Research Connection's (CRC) senior research team utilizes their many years of expertise, skill, and education to serve you and your clients.

The well trained, on-site recruiting staff consistently produces reliable, quality respondents to answer your marketing research questions.

Our personnel, rated highest among all Top Rated facilities in Columbus in the Impulse Survey of Focus Group Facilities 2011, is assembled with one goal in mind: superior customer service.

Finally, the facility: Complete Research Connection offers a brand new, 8,000+ square foot facility which opened in 2011. Located just five miles from downtown and less than 15 minutes from the airport, the facility boasts four research suites (one multi-purpose, two standard, and one IDI suite) that all offer digital recording and video streaming; two of the larger suites offer wrap-around viewing for approximately 30 [illegible] facility is just one of the many facilities in the Focus Coast to Coast alliance. This alliance of independently owned and operated, Impulse Survey "Top Rated" facilities, allows our clients to make just one call to CRC and be offered estimates and even field management for projects across the U.S. and abroad.

So what other interesting facts are available about Columbus? According to the 2010 Census, the age distribution is under 18=24.2%, 18 to 24 = 14%, 25 to 44 = 35.1%, 45 to 64 = 17.9%, and 65+ = 8.8%. The median age was 31 years. For every 100 females there were 94.6 males. The median income for a household in the city was [illegible]7.The Columbus metropolitan area has experienced several waves of immigration in the 20th century and into the 21st, including groups from mainland China, Europe, Taiwan, Vietnam, Russia, Japan, Somalia, India, and ongoing immigration from Mexico and other Latin American countries. Many other countries of origin are represented as well, with much of this related to the international draw of The Ohio State University. 2008 estimates indicate that roughly 116,000 of the city's residents are foreign-born, accounting for 82% of the new residents between 2000-2006 at a rate of 105 per week. 40% of the immigrants have come from Asia, 23% from Africa, 22% from Lat

••• advertising research

On the face of it

Applying facial coding to ad testing

| By Dan Hill and Aron Levin

snapshot

A look at the results of a study that used facial coding to test the sales effectiveness of automobile ads shown during Super Bowls.

Researchers have expanded beyond traditional measures of recall and attitude toward an advertisement and now tend to agree that a more comprehensive approach to measurement is warranted. One of the more promising avenues of research on advertising effectiveness continues to be measurement techniques that assess consumers' emotional responses to advertisements. If indeed it's true, as Gerald Zaltman has pointed out, that 95 percent of consumers' "thought" process is below consciousness, then measures that go beyond consumer self-reported surveys could have distinct advantages at predicting an ad's impact on the target market.

This article uses facial coding to measure college students' emotional reactions to a series of advertisements from the 2010-2012 Super Bowl television broadcasts. Of particular interest is how a specific facial coding technique compares to other emotion-based measures and more traditional self-reported surveys at predicting sales of advertised products.

Primarily intuitive

Advances in brain science over the past 25 years have firmly documented that people are primarily intuitive, sensory-emotive evaluators and decision-makers. As recently as a decade ago, the Advertising Research Foundation (ARF) maintained the orthodoxy that people's thought process in response to advertising followed a think>do>feel model. In other words, a conscious, cognitive evaluation of the TV spot and the utility of the product as showcased in the TV spot was supposedly the determiner of whether a sale resulted from the TV spot's airing or not.

By contrast, we suggest that the more realistic model for consumer decision-making is actually sense>feel>think>do, in keeping with the fact that over 95 percent of people's thought process happens on a less-than-fully-conscious level and that sensory impressions and our emotional responses to them are anchored in parts of the brain whose origins go back hundreds of millions of years. The sensory (reptilian) brain and

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the emotional (mammalian) brain work hand-in-glove. The rational (human) brain is considerably younger, which in evolutionary terms means it is estimated to be 100,000 years old. We believe that many of the traditional methods of research focus on the rational brain, which evidence shows is not what truly drives most decisions.

To put this notion of different parts of the human brain with different functions into the context of the current study, consumers viewing TV spots don't think their feelings, they feel them. So, resorting to a traditional series of cognitively-posed questions with input most often given as ratings is an open invite for test participants to provide intellectual alibis (i.e., good, defensible explanations that may not bear any relation to motives and preferences). As J.P. Morgan said, "A man makes a decision for two reasons: the good reason and the real reason." The advances in brain science would suggest that the real reasons often reside in the realm of what people can't or won't say, whereas traditional market research resorts to documenting the "good" reasons instead.

To change that paradigm, a host of scientific research tools have been gaining prominence in recent years, as acknowledged in part by the ARF's recent neuromarketing task force that evaluated new research tools worthy of regard. Among them, and the tool at the heart of this study, is facial coding.

Shown promise

Three types of emotions-based research methodologies have shown promise at capturing consumers' emotions to products, services and advertisements. They are EEG, fMRI brain scans and facial coding.

EEG. Included among the ranks of EEG practitioners is Sands Research, which since 2008 has been running an annual Super Bowl ad study using electroencephalogram (EEG). This tool involves attaching electrodes to the scalp via a kind of "bathing cap" that holds them, meant to monitor the brain's electrical activity. Widely respected as a means of getting split-second timing regarding brain activity, EEG on the other hand suffers from lacking in spatial ability what it enjoys temporally: accuracy. Not only is the emotional, mammalian brain deep inside the skull and thus relatively inaccessible to the readings taken by the EEG electrodes, gaining any precise readings of the numerous, intricate parts of the brain not on or adjacent to the surface is likewise a problem for EEG.

FMRI. Methods of neuroscience such as functional magnetic resonance imaging (fMRI) have led to breakthroughs in the relatively new areas of neuroeconomics, neuromarketing and decision neuroscience. The basic goal of neuromarketing is to gain an improved understanding of the neural mechanisms underlying consumer behavior, providing marketers with greater insight into consumers' feelings about products and motivations for purchase. FMRI studies use changes in blood flow that accompany neural activity in different parts of the brain to associate these areas to particular behaviors. However, fMRI studies typically have small sample size due to financial constraints. Furthermore, the complexity of the brain (10 billion neurons), the imprecise time lag involved in tracking blood flow peaks and the invasiveness of the technology create practical limits for the tool's use in market research.

Facial coding. Charles Darwin was both the first scientist to take emotions seriously (as a survival mechanism) and also the first to realize that in your face you best reflect and communicate your emotions. That's true because of three reasons: universality (how we emote is hardwired into the brain and transcends factors like gender, age, race and culture to the extent that even a person born blind emotes in the same ways that others do); spontaneity (the face is the only place in the body where the muscles attach right to the skin, enabling essentially real-time data given a brain-to-face connection via the facial muscle nerve that sits right below the ear); and third, abundance (human beings have more facial muscles than any other species on the planet).

A century later, Darwin's initial discoveries were codified into the Facial Action Coding System (FACS) by Paul Ekman and his collaborator Wally Freisen. Their classification is based on recognizing which facial muscle movements (called action units or AUs in FACS) correspond to which of the seven core emotions of happiness, surprise, sadness, fear, anger, disgust and contempt. This system provides a means of capturing, identifying and ultimately quantifying emotional response across cultures, and in functional, operational terms of being able to do so without attaching invasive, unnatural sensors or sliding people into a tube as is true of fMRI brain scans. The current study uses a technique for measuring facial expressions, and corresponding emotions based on the Ekman and Freisen FACS method.

Methodology

Careful consideration was taken to find ads that aren't product-centric and are, instead, brand-related. Moreover, those companies who ran more than one TV spot during the same Super Bowl for the same product were excluded because of the lack of precision in separating out the effects of multiple ads. Finally, other candidates for exclusion were those TV spots that didn't air nationally or those where the sales data proved difficult to secure in meaningful terms.

For this study, a set of 13 TV spots from the 2010-2012 Super Bowls served as the basis of this measurement of consumers' emotional reactions to ads and its connection, or lack thereof, with actual sales data of the advertised products. They're all taken from the automotive sector for the very practical reasons that car units sold represent major purchases and are carefully and rather publicly tracked by specific models.

Sample and procedure

A group of 120 undergraduate students from Northern Kentucky University and Emerson College viewed 13 TV spots aired during these Super Bowls. Sales data for the cars advertised was obtained from GoodCarBadCar.net, which uses sales data from auto manufacturers and *Automotive News* Data Center. We were primarily interested in changes in sales from January to February in 2010 to 2012 to determine what lift, if any, the Super Bowl ads may have brought to the cars being advertised. Of course, we recognize that many variables account for the sales of cars but in the case of this study we focused on Super Bowl advertisements.

After a brief orientation and explanation of the procedure, participants were shown a battery of TV spots ranging in number from six to 15 depending on the stage of testing. (Note: Not all TV spots tested were used in the final report because of criteria cited earlier, related to sales data.) The TV spots themselves ranged in length from 30 seconds to 75 seconds and were shown to the participants in a randomized order using a laptop computer with either a built-in Webcam or one equipped with a Logitech camera.

To code the facial expressions of this study's sample, a trained and experienced coder adhered to EMFACS (the emotions-oriented versions of the Facial Action Coding System). It involves 23 different muscle movements, known as action units. Seven involve activity involving the eyebrows, eyes, forehead or nose. The others are revealed in proximity to the mouth. The trained coder who conducted this analysis followed a process that involved watching all the video files for a given test subject as a block of video. This approach has the advantage of acclimating the coder to each person, in turn, growing familiar with their baseline temperament or emotional disposition. For instance, a person who is generally dour – with, say, the corners of the mouth turned downwards as a more or less permanent, resting position – then needs to have that expression deepen still further or be relieved for it to qualify as an expression.

Once acclimated to a subject by reviewing their responses across one or more stimuli exposures, the coder is ready to begin careful coding. This step requires watching each video on a desktop computer, while using programmed software inside a facial coding studio that allows the coder to more easily freeze-frame, slow-motion and replay the video on a frame-by-frame basis, at 30 frames per second. On a first pass, a coder watches for where the obvious expressions fall in general terms and may stop to enter the appropriate AU code or codes in the facial coding studio as these AUs become evident. Another approach is to note on a pad the approximate timing, then, on a second pass-through, control the video on a split-second basis to detect when exactly the peak of the expression occurred and enter the data in the studio system.

On occasion, such as when an expression is very subtle or more than one AU is involved, it may be necessary for a coder to replay, freeze-frame and otherwise study the video until everything is resolved and identified. In some cases, of course, an expression occurs, then reoccurs. In that case, each new peak of the expression during the passage from onset to the offset of the expression is tagged.

For our study, the various TV

spots seen by a given test subject were coded. On average, it takes about four to five minutes to facially-code every 30 seconds of viewing response. But there are certainly many instances where the subject has little to no response; they are not emotionally engaged by what they are seeing. Alternatively, there are numerous instances where a person may emote a lot, requiring extensive coding. Data from the coding are organized on an overall, aggregate basis and also on a second-by-second analytical basis.

After the exposure, depending on the stage of testing, the participants were either asked to provide a 30-second response to a purchase-intent question (How likely are you to recommend this product to a friend?), which was also facially-coded; a 1/low to 7/high purchase intent rating (also facially-coded). (Note: Response data cited in this study were drawn from only the ratings exercise.)

Correlation results

Since 1988, *USA Today* has published survey results within the week after that year's Super Bowl announcing readers' preferences among the Super Bowl TV spots just aired. Sample size for the surveys is typically around 300 respondents. In *USA Today*'s Ad Meter, respondents rate ads on a scale of 1-10, where 1 is the lowest and 10 is the highest.

The longevity of the *USA Today* poll and Sands Research data allowed us to draw on possible correlations for the TV spots in our data set. *USA Today*'s Ad Meter was the weaker of the two with an R^2 of only .015. Sands Research data revealed an R^2 of .054 for its arousal data. As we will show, facial coding in this study was shown to be more successful at predicting sales than USA Today and an EEG measurement.

Results based on facial coding

Facial coding naturally lends itself to reporting consumer emotional response data in numerous potential ways. The scoring system used for this study takes the 23 action units from FACS and ascribes to each of them the following: a specific impact or intensity score; a specific appeal or valence score; and can also detail the percentage of specific emotions felt based on FACS' correlation of each of those action units of muscle activity to one or more of the seven core emotions cited earlier. The AU impact and appeal scores are based on taking into account the innate qualities of each AU as expressed on people's faces. For instance, there are several ways in which anger gets expressed, using different AUs, in ways that could be described as ranging from mere annoyance to outrage. The stronger the way of expressing anger, the more negative the appeal score and the higher or more intense the impact score. Conversely, there's a difference between a true smile (joy) and a tepid social smile, such that in this case a true smile will receive a higher, more impactful score and be more positive than a weak smile.

Formula scores

The video data of facial expressions were compiled by 1) a method of engagement involving the amount of emoting in terms of the percentage of people emoting and the volume of emoting; 2) a measure of a specific subset of the seven core emotions and the amount of reaction generated according to each; 3) a second method of engagement, related to temporal pace and frequency; and 4) a study of which emotions were felt, as a measure of valence, during the branded moments of the TV spots.

Each of the four elements has specific scoring ranges that were normalized to make each element have a minimum value of 0 and a maximum value of 1. Those moments consisted of when the voice-over cited the branded offer by name, when the car with its branded logo was clearly visible or in those cases where the car's design (think of both the Mini and the VW Beetle) is so distinct as to serve as a brand signifier. A formula involving those four measures, with a weighted degree of each, totaling 100 percent, led to the specific results in rank order of performance from January-February 2010-2012 sales growth shown in Figure 1.

The table summarizes the data regarding the relative rankings that *USA Today* readers and EEG-tested

Figure 1: Ads and Scores Across All Measures (sorted by monthly sales growth)

Company	Ad Title	Monthly Sales Growth	Facial Coding Formula Score	USA Today	Sands EEG
Chevrolet	"Misunderstanding"	36.1	.528	6.6	3.7
Kia	"One Epic Ride"	31.1	.513	6.2	3.8
Mini Cooper	"Cram it in the Boot"	29.1	.631	5.3	4.2
Kia	"A Dream Car. For Real Life."	26.8	.549	7.8	N/A
Chevrolet	"Happy Grad"	21.3	.640	7.0	2.3
Hyundai	"Painted Sonata"	20.3	.576	4.9	3.0
Chevrolet	"2012"	20.3	.528	7.3	4.7
Chevrolet	"Tommy"	12.6	.554	7.0	4.6
Kia	"A Departure from the Expected"	6.3	.571	6.1	3.2
Volkswagen	"Black Beetle"	-5.5	.544	7.5	4.9
Volkswagen	"The Dog Strikes Back"	-7	.438	8.7	5.4
Audi	"Green Car of the Year"	-7.3	.480	7.4	3.0
Chevrolet	"Discovery"	-12.5	.369	6.2	5.0

participants gave to nearly all of the 13 Super Bowl TV spots under review. The data for both methodologies produced a sufficient amount of variation, with Ad Meter scores ranging from 4.94 to 7.75 and EEG scores ranging from 2.3 to 5.4 (with the top-end EEG score possible in the Sands methodology not known).

Figure 1 shows that the rank-ordering of ads in terms of monthly sales growth of their products following the Super Bowl more closely conforms to the predictions of the facial-coding formula than to *USA Today* polls or Sands Research data, especially in predicting negative sales growth. This is perhaps a reflection of the difference between "good" reasons and "real" reasons for buying products.

This model looking at the impact of formula score on monthly sales growth had an R^2 of .404, showing a greater degree of explanatory power than other models. Finally, by facially-coding the participants while they gave their verbalized rankings for 10 of the 13 TV spots in this study, an additional advertising/sales relationship result emerged. Here, two emotions were enough to produce substantially higher correlations as follows: R^2 = .69 when positive emotions were taken into account and R^2 = .43 when negative emotions were taken into account.

An accurate reading

In this study, we have shown that a method for analyzing consumers' facial expressions proves to be a stronger predictor of sales than survey-based and other emotion-based measures. Facial coding appears to be a methodology which can be of great value to marketers who are interested in getting an accurate reading of consumers' emotions. This measure has value not only in the advertising context of this article but in analyzing consumers' reactions to new products, their experiences in service settings and a variety of other applications.

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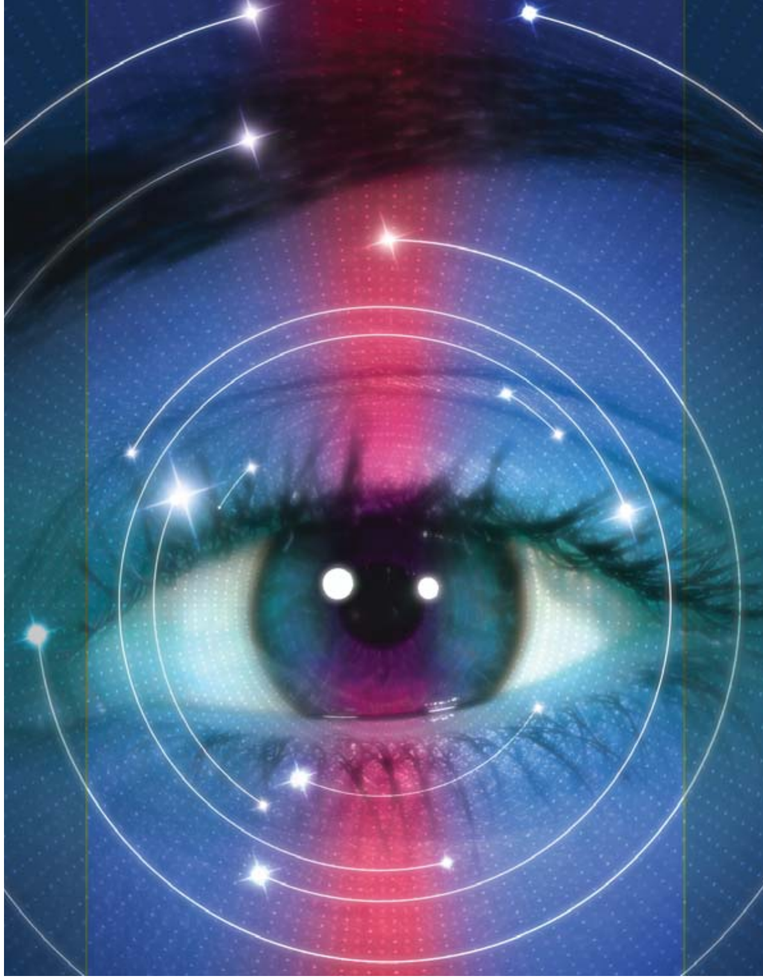
advertising research

Look your best

Getting the most from eye-tracking

| By Scott Young



snapshot

Scott Young offers best practices for the use of eye-tracking and explores the various research applications of the methodology.

Over the past five years, there's been an explosion in the availability and use of eye-tracking in consumer research, for applications ranging from packaging research to copy testing and Web usability. This is clearly a positive development, as more marketers, designers and agencies have come to recognize and benefit from its added value. However, broader deployment has also inevitably led to misuse and misinterpretation of findings and in some cases a backlash against eye-tracking.

A pioneer in the use of eye-tracking in marketing communications research, today we conduct over 800 studies annually utilizing this technology, primarily in the context of packaging and shopper studies. This article shares our perspective on the primary value of eye-tracking and offers several best practices for its effective use. In addition, we'll briefly discuss some new applications that are allowing companies to leverage eye-tracking in different contexts.

Its value and its limitations

To apply eye-tracking effectively, it's best to start with a fundamental understanding of both its value and its limitations. In other words: What exactly can tracking eye movement tell us? What questions can it help us answer? Across the media we've studied, we have found that the answer is threefold. Eye-tracking can document:

Visibility. Do people even see and notice a package on a cluttered shelf, a display in an enormous store or a link on a cluttered Web screen?

Engagement. Do these marketing efforts hold their attention or are they quickly bypassed?

Viewing patterns/communication hierarchy. Which specific elements or messages draw attention and are consistently seen/read – and which are frequently overlooked?

These three dimensions provide important direction in terms of when eye-tracking is most likely to be valuable. Because eye-tracking measures visibility and engagement, it is typically most relevant in situations in which the marketer is buying "space"

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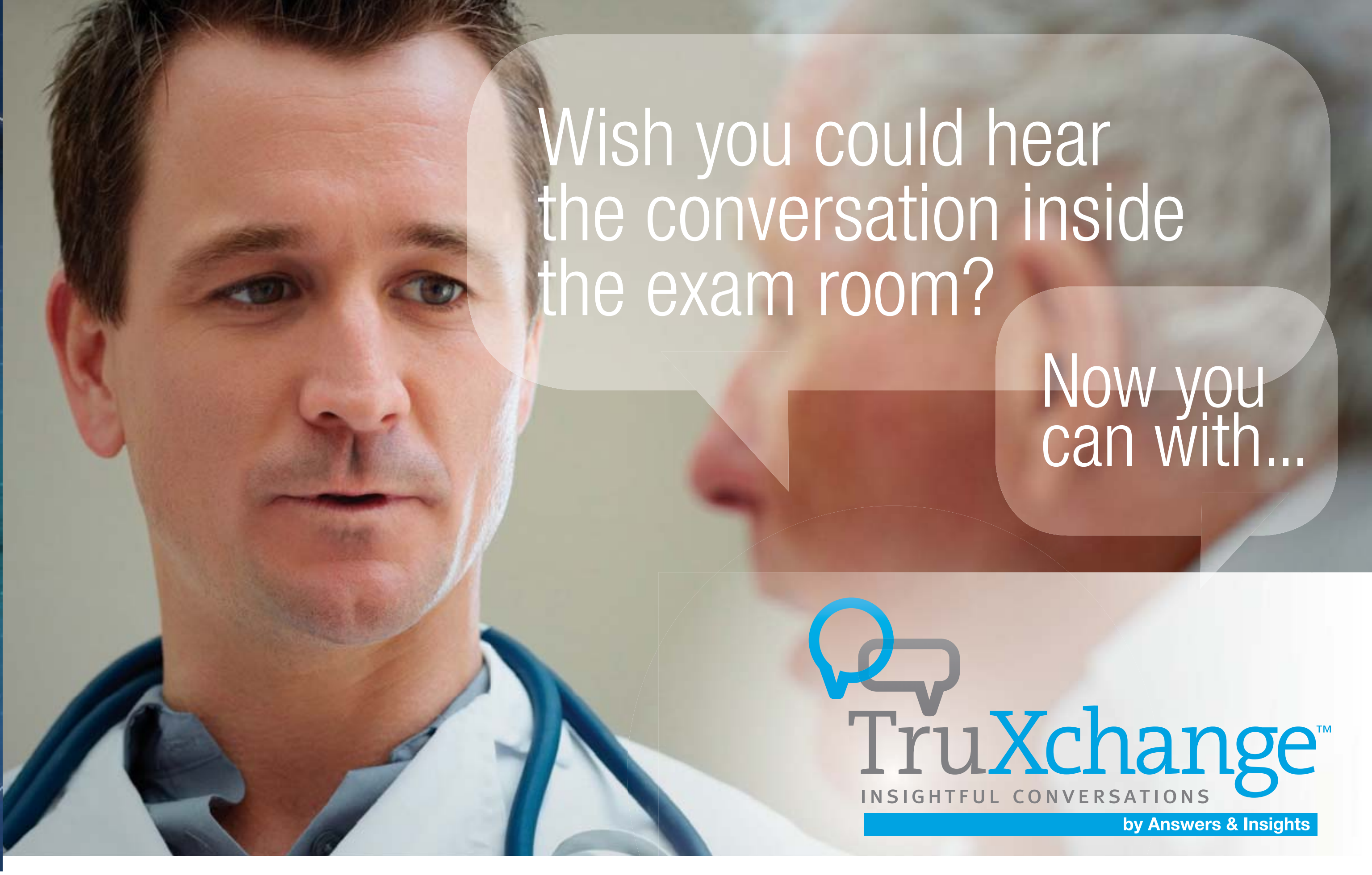

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(such as an ad in a magazine or a package on a shelf) and attempting to capture a viewer's time and attention. In these media, the shopper or reader is in control:

- She can spend as much (or as little) time as desired – and check out at any time.
- She can start where she wishes – and control the viewing sequence/order.
- She may focus all her attention on a compelling visual – and never even notice the branding or engage with claims.

Conversely, we've found that eye-tracking typically offers less added-value in broadcast media (such as television and some forms of digital marketing), which have a clearly-defined time frame and viewing sequence (for example, a 15-second TV spot, with a defined beginning, middle and end). In these contexts, eye-tracking may answer a specific question (i.e., Did viewers ever see the logo and read the tagline?) but this learning may offer limited insight (as communication can also happen verbally, via the voice-over).

Regardless of media or application, it's also very important to understand the limitations of eye-tracking. As many have correctly pointed out, eye-tracking doesn't tell us whether someone likes a package or wants to buy the product inside. A hypothetical example would be the proverbial "pink polka-dotted" packaging: It would certainly stand out and get visual attention (within the toothpaste aisle, for example) but this increased visibility wouldn't necessarily convert to more purchases. This reality – that the most visually-impactful execution is not necessarily the most effective – is sometimes cited as an argument against using eye-tracking. However, it is more accurate as a reminder that:

Eye-tracking should not generally be used in isolation. The learning and insight comes from understanding the linkage between visibility and other key metrics (brand recognition, message delivery, persuasion, etc.).

Attention is an important hurdle for marketing communication (but not an end in itself). While "unseen is unsold," visibility is only the first step toward purchase.

In fact, we've repeatedly found that the primary value of eye-tracking lies in helping marketers uncover why efforts aren't working. For example, are they getting lost in clutter and never creating an opportunity to sell? Are they being seen but not leading people to key messages? Are they fully-considered but not persuasive?

A breakdown on any single dimension leads to failure yet each has a very different implication and potential solution. When used properly, eye-tracking is more than an evaluative metric; it is a diagnostic tool that uncovers limitations and provides direction to marketers and creatives.

Best practices

In addition to designing studies and interpreting findings correctly, researchers also need to follow some best practices to ensure that they are gathering valid and meaningful data. In the context of studies including eye-tracking, this often involves focusing on what not to do or say:

Don't show multiple options. Many clients have an incoming pre-disposition to show individuals many different versions of packs, ads or shelf sets, in order to see how changes in design will impact visibility and viewing patterns. However, we've found that when a person sees multiple variations of the same piece, it alters his or her behavior: Inevitably, s/he begins looking to see "what's changed" – and this negatively impacts the underlying eye-tracking data. Thus, while showing materials within competitive clutter (a cluttered shelf, magazine, etc.) is a best practice for eye-tracking studies, each person should see only the execution of the test brand (i.e., monadic study design).

Don't ask "Why?" It's even more tempting to ask people directly why they looked at some things – and ignored others. And certainly, if consumers are asked these questions, they will provide answers and describe logical explanations for their viewing patterns and behavior.

Unfortunately, these well-intentioned "answers" are likely to be misleading because we know from experience that visibility is primarily physiological, rather than rational. In other words, humans are hardwired to see a huge green color block of Fructis shampoo – regardless of our perceptions of the brand – because the packaging creates strong contrast with its surroundings. Similarly, within advertisements, Web screens or packages, readers' viewing patterns are dictated by the treatment and layout of elements, rather than readers' interest in them. Thus, while eye follow-up questioning (on messaging, branding, communication, persuasion, etc.) is a best practice for eye-tracking studies, direct questioning on viewing patterns is not recommended.

Don't cut corners on stimuli. Any marketing communication study is only as valid as the quality of what's shown to consumers. With eye-tracking studies, having the right stimuli is particularly critical because a primary objective is often to gauge visibility within a cluttered store, magazine or roadside. Yet many eye-tracking units are designed to track eye movement as people view computer monitors. This makes sense for Web-based marketing efforts, since the materials may ultimately be viewed on a monitor. However, it becomes problematic (and misleading) when attempting to gauge the in-store visibility of a packaging or merchandising system – and an eight-foot-wide product category or 40-foot aisle is shown on a 20-inch monitor. In fact, our research-on-research suggests that a best practice is to show items at 80 percent or more of life-size, in order to accurately document visibility and viewing patterns.

Don't rely on qualitative samples. As eye-tracking becomes a core component of validation studies (a set of visibility/attention measures against which new systems will be judged), there's an understandable desire to gather these metrics earlier in the development process.

Marketers and designers now want to incorporate eye-tracking in the screening process to identify new options that will break through clutter – and gather insights and diagnostics (to guide refinements) prior to quantitative testing.

This is the right thought process, but it's also important to be aware of the limitations of qualitative base sizes. In our experience, we've found that 20-30 eye-tracking interviews can provide insight regarding primary viewing patterns (i.e., readers' start point and typical path through an advertisement or package) and identify possible concerns (i.e., Is a key claim getting lost in this design?). However, a study of this small scope is not valid to gauge visibility (i.e. What percent of people even saw our brand?), which requires quantitative sampling and benefits from comparisons to normative data (i.e., What visibility level should we expect in this situation?)

Don't confuse eye-tracking and click-streams. Finally, it is important to distinguish between actual eye-tracking (which records viewing patterns) and other methods (which ask people to click on parts of packs or ads that they claim to have noticed or found compelling). Simply put, the latter approach is not an accurate measurement of visibility, but rather of claimed interest. In addition, because the eye is much faster than the hand and mouse, it provides data that does not consistently correlate with actual viewing behavior.

New applications

In addition to wider use, the recent revolution has also brought eye-tracking technology into new applications and contexts. Two of the more exciting directions involve the retail environment:

Virtual eye-tracking. By linking eye-tracking technology with sophisticated virtual store environments, researchers can now leverage eye-tracking while pre-testing new approaches to in-store signage, displays, aisle configuration, category management and product assortment. They can simulate new retail scenarios, show them to shoppers at nearly life-size – without actually producing and placing materials in stores – and document their impact on visibility and purchase: Does a new approach increase a brand's retail visibility? Are in-aisle displays or signage getting attention? If so, do they convert to additional purchases?

Mobile eye-tracking. Via a pair of eye-tracking glasses, it's now possible to create a videotape of each person's exact viewing patterns in any context. Mobile eye-tracking is being used most frequently in store environments, to track shopping patterns and document engagement with displays, signage and packaging. We've also found it quite valuable in helping marketers understand what influences the shopper's in-store journey – and to improve point-of-sale marketing – across different retail environments, such as club stores, convenience and kiosks.

Through consumers' eyes

While eye-tracking is not actually a new research tool, its use is growing significantly, as marketers' recognize the value of seeing the world through consumers' eyes. However, it measures only a piece of the marketing puzzle – and should be viewed as a single measure of success. In fact, eye-tracking's greatest source of value lies in its diagnostic insights, as a tool for understanding why and guiding enhancements to marketing efforts.

More importantly, as with any research tool, eye-tracking's validity and value are dependent on how well it is used, in terms of applications, study design, stimuli and analysis. Thus, while researchers should aggressively leverage eye-tracking, they also need to adhere to fundamental principles to ensure meaningful data and insights. By doing so, they will help create more effective marketing efforts that help their companies win in an increasingly cluttered and competitive world, where consumers' attention can't be taken for granted. Q

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••• advertising research

Information for persuasion

How analytics can inform and improve the ad research process

| By Jody Moxham and Terry Villines

snapshot

Incorporating analytics along with data from ad hoc research studies can aid the development of advertising by giving marketers the most complete view of the competitive landscape and an ad's place within it.

The winds of change have been raging through the market research world for the better part of a decade now. Everywhere we go, marketers are struggling with too much data, not enough data or having data they don't know how to use.

Analytics has been emerging as the way to make sense of the data, so much so that the world of big data has declared this the decade of the analyst. We would argue that the need for analytics extends deep into the market research realm, particularly into marketing communications.

In view of today's far more complex and data-rich environment, analytics is a welcome addition to the valuable uses of qualitative and quantitative research. Each of these traditional research methods engages customers directly and elicits useful responses. The current situation, however, requires more nuanced and richer insights than can be gotten by talking with consumers. That is where analytics comes into play.

It used to be that advertising was the single-most important tool marketers had in leveraging sales or market share. The evolution during the last decade has resulted in a changing role for advertising and an increasing role for other forms of marketing communications. Analytics accommodates all aspects of a marketer's arsenal and provides actionable insights.

Analytics has considerable advantage over directly asking consumers what they think about an ad, a campaign or even the appropriateness of a channel. Once fully developed, analytics lets you look in the headlights and reliably forecast how communications and strategies will perform, allowing you to make adjustments before costly production of any kind. Analytics also provides the ability to look in the rearview mirror and diagnose why communications and strategies performed as they did. And analytics can do so with an n of zero – in other words, without the need to speak directly with consumers.

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Codify the patterns

That should not be a surprise. As a community we have been tracking advertising performance for more than 60 years. One of the great advances of analytics is the ability to matrix marketing situations and codify the patterns that historically have high correlation with success and failure for each set of variables within the situation. Equally as important as identifying the patterns is understanding the role each variable plays in leading to success or disappointment.

Research analysts at our firm, PhaseOne, identified more than 290 variables that can influence the success of marketing communications. Our research has shown that 44 percent of these variables have a positive effect and drive performance; 30 percent have a negative effect that will limit performance; and the remaining 26 percent have a neutral effect but may be necessary to hold the story together.

The goal is to reduce the presence of variables that have a negative impact on communication – to accentuate the positive, so to speak. We use analytics to determine the strength with which a communication engages the audience and is able to compete within the competitive frame. In order to arrive at those conclusions, we diagnose the role that each element plays in engagement, building interest in the brand, persuading on behalf of the brand and driving memory of the message. Because analytics is a desktop exercise, we can create a mosaic that illustrates how each communication performs individually as well as how it fits with all the other marketing elements. Even more importantly, analytics allow us to explain why, which allows changes that maximize investment and return.

Strong marketing messages are built upon powerful communications strategies. Analytics can also be harnessed in the development of winning strategies. In fact, when it comes to the variables that influence the success of a communication strategy, our analytics has identified 120 marketing situation variables, including product category, competition, product life cycle, target audience, societal influences, economic indicators and others.

The ability to do real-world testing of hypotheses that are formed in academia allows us to prove the situations in which a hypothesis is valid and when it isn't. Also, our partnerships with organizations and their creative agencies have resulted in a constant sharing of real-world marketplace data. This, along with staying abreast of academic developments, allows analytics to be tailored to fit unique needs. And yes, each marketer's situation contains something that makes it unique. That is why we have not found one-size-fits-all solutions.

Consider the challenge a global packaged goods company faced when it had a finite budget to cover marketing throughout Europe. In one country the brand was the market leader; in another a distant third; in yet another country a new entry, and so on. The client's budget allowed for one mass-media campaign that would be translated into multiple languages. The application of our analytics helped the brand team and their ad agency develop a cam-

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www.ampincww.com

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505-856-0763
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Behavior Research Center
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www.brc-research.com

Beta Research Corporation
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www.BetaResearch.com

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http://crresearch.com

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www.communicus.com

Consumer Insights, Inc.
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www.consumerinsightsinc.com

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www.creativewavesresearch.com

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Deep See
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Digital Research, Inc.
207-985-7660
www.digitalresearch.com

DLG Research & Marketing Solutions
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DMCotter Research & Strategy, Inc.
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www.dmcotter.com

EyeTech Digital Systems, Inc.
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www.eyetechds.com/research

EyeTracking, Inc.
619-265-1840
www.eyetracking.com

EyeTrackShop
917-532-0007
www.eyetrackshop.com

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FocusVision Worldwide » SEE AD p. 47
203-961-1715
www.focusvision.com/home.aspx

GMI » SEE AD p. 11
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GutCheck
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http://gutcheckit.com

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908-788-9393
www.hcdi.net

Headspace
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www.hdspc.com

insight europe gmbh
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www.insighteurope.de

Insight Strategy Group
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www.insightstrategygroup.com

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

Kadence International (U.S.)
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www.kadence.com

KeyStat Marketing, Inc.
720-956-6800
www.keystatmarketing.com

Leap Research
717-652-2455
www.leapresearch.com

Millennium Research Inc.
612-724-8687
www.millenniumresearchinc.com

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

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

Olson Research Group, Inc. » SEE AD p. 49
267-487-5500
www.olsonresearchgroup.com

Outsmart Marketing
952-924-0053
www.outsmartmarketing.com

Persuadable Research Corporation
913-385-1700 x302
www.persuadables.com

PhaseOne Communications
310-242-9779
www.phaseone.net

Pinnacle Research Group, LLC » SEE AD p. 18
573-547-3358
www.pinnacleresearchgroup.com

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The PreTesting Company, Inc.
201-569-4800
www.pretesting.com

Probe Research, Inc.
212-922-9777
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ReRez
214-239-3939
www.rerez.com

Russell Research, Inc.
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www.russellresearch.com

Schwartz Research & Consulting
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Shugoll Research
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SIS International Research, Inc.
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StrataMark Dynamic Solutions
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www.stratamarkds.com

Strategic Business Research, Inc.
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www.sbr-inc.com

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888-618-0292
www.usamp.com

VeraQuest, Inc.
914-219-5077
www.veraquestresearch.com

VS Research LLC
201-498-9333
www.vsresearch.com

W5
919-932-1117
www.w5insight.com

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

WestGroup Research
602-707-0050
www.westgroupresearch.com

Youth Pulse, Inc.
888-292-8855
www.ypulse.com

paign around a single idea that would be appropriate to each of the diverse marketing situations. This required a comprehensive analysis of the target audiences' attitudes and behaviors, the competitors' claims, the brand's equity, along with other societal influences and conditions. It was by matrixing these various inputs that we were able to help illuminate a path forward. In spite of heavy and growing competition, our client has maintained market share in all countries and has grown share in several.

What is essential

We've talked a lot about the benefits of analytics and feel we must take a moment here to discuss what is essential in any analytic methodology. Yes, methodology. Analytics is not just the opinion of a smart person with a lot of experience. Such a person can be useful but even the best individuals are right at most 55-60 percent of the time. Like Wanamaker said a century ago when he found that half the money he spent on advertising is wasted, "the problem is that I don't know which half." By contrast, an evidence-based methodology, like ours, has typically been validated by tough marketers at the 75-80 percent range and on occasion as high as 87 percent. This reliability is inherent in the methodology being based on evidence, not opinion.

When we set out to develop a methodology for explaining the effect advertising would have on consumers, we started on a quest to acquire all the knowledge about communication that resided in the social sciences, advertising tracking and sales studies, marketing principles, the entertainment world (storytelling) and education principles. It takes a multidisciplined approach to provide insights as rich and varied as our consumers are today. In order to produce those insights, our analysts follow a deconstruction/reconstruction methodology. We begin by coding the communication content, style, structure and nuances, including objectively determining the energy with which each incremental idea is expressed. During the reconstruction stage, we map all that codified data onto frameworks that have been proven to aid accurate determination of persuasiveness, memorability, engagement, relationship to other communications in the marketing arsenal and ability to compete successfully with competitors' claims.

We will share an example of how multidisciplined, methodological analytics in the right hands can lead to behavior-inducing communications. A global marketer had developed a new product that incorporated technological breakthroughs and offered vastly superior benefits. The breakthroughs were essential to success in an already-crowded category. We analyzed several options for an introductory campaign based on the futuristic technology. Our semiotic analysis identified the brand's image would be ultramodern, sophisticated and high-tech, while our motivational analysis identified a high level of persuasiveness. As a result, the agency dramatically changed the nonverbal elements, which we identified as the source of the image. The agency replaced them with semiotic cues that were homey, comforting and imbued the brand with a sense of familiarity and tradition. The persuasive value proposition remained the same. The introductory campaign quickly met, then exceeded, the penetration goals the marketer had set. This semiotic analysis was part of our multi-disciplined approach that examined the campaign from multiple directions including persuasiveness, motivational triggers, mnemonics, self-identification likelihood and other key elements. A multidisciplined analytic and evidence-based approach provides powerful benefits when in the hands of a knowledgeable user.

Quest to explain why

Analytics is a never-ending quest to explain why. Validity and reliability of an analytics methodology relies on a commitment to stay abreast of new perspectives and test new hypotheses. The explosion of knowledge coming out of neuroscience and big data today is dramatically enhancing understanding of how people process information, what motivates their behavior, what turns them on, what turns them off, what people say vs. what they do and so much more.

We are on the cusp of a new era in market research. Analytics will be at the center of it. Analytics offers powerful insights that can be harnessed by professionals like you to improve performance, make better-informed decisions, think about solutions in new ways and move you more quickly toward the future.

Jody Moxham is chief innovation officer and co-founder of PhaseOne. She can be reached at jodymoxham@phaseone.net. Terry Villines is vice president, director of analysis at PhaseOne. He can be reached at terryvillines@phaseone.net. Both Moxham and Villines are based in the firm's Los Angeles office.

the business of research

The cure for infophobia

Why companies avoid using data for decision-making

| By Marco Vriens

snapshot

Companies are awash in information but decisions are still often made on little more than gut-feel, the author says. He outlines strategies for driving the uptake of insights to help make data an integral component of organizational processes.

Many organizations fail to take advantage of the information that's available to them. Listening to anecdotes and reviewing business articles, books and papers suggests that decisions are often based on something other than data and insights. For example, an article in Information Week reported that most managers in retail who are responsible for price-setting prefer gut-feel, while only 5 to 6 percent reported using decision support systems to help them leverage insights to set prices better. Similarly, a study found that 40 percent of major decisions are based not on facts or insights but on the manager's gut. If that is true, then the percentage of "minor" or "less-major" decisions based on gut-feeling is likely to be a lot higher.

Even if decision makers do seem to take advice (read: accept insights), they might not fully accept the insights. According to some research, decision makers have been found to adjust their initial opinion by only 25 percent toward the advice and insights offered by others.

Based on my experience at various Fortune 500 companies, I have seen and experienced the types of action that can drive the acceptance and correct usage of insights and what can help improve the many decisions made throughout an organization. The following are beneficial to making sure insights are known, accepted and used: direct persuasion; indirect persuasion; processes for quality decisions; and interactive decision support tools.

Direct persuasion

Market research insights are often communicated to a direct stakeholder – someone who may have asked for the insights or commissioned the research. Whether the recipients of the work will accept the insights or the advice depends on characteristics of the insights, i.e., perceived credibility, actionability and acceptability. It also depends on the characteristics of the messenger: seniority, likeability, similarity.

Decision makers take a risk if they act on insights, as the insights may not be valid. This

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is called information usage risk. The more credible the insights are, the lower the perceived risk and the higher the likelihood the decision maker will act on the insight. Credibility is a function of 1) how well the insights are understood, 2) the rigor of the used methodology, 3) the degree to which insights are validated more broadly and 4) the degree to which the insights can be given meaning in a certain business situation.

Research and analytics professionals should articulate the methodological rigor (or lack thereof) and emphasize it during the communication of the insights. I recommend summarizing the key methodological features, both strengths and weaknesses. What can and what can't be inferred from the data and analyses should be called out. I also recommend assessing the degree of validation and the evidence to justify influencing a decision. The key is to communicate what steps have been taken to generate high-quality data and insights and to point out the limitations of the insights. This helps get insights adopted (studies have shown this). Lastly, making insights meaningful for a given business context will increase credibility. This can be done in a variety of ways. A simple quote from a customer can make a more general insight more credible. Alternatively, weaving several connected insights into a "story" also will help.

In general, I have seen three factors that impact perceived actionability: alignment to short-term objectives, timeliness and clear ownership.

Understanding of the business that one is trying to influence or impact is key to delivering insights that are linked to short-term objectives and to show if there is a link to the bottom line. Decision makers are usually much more motivated to act on advice that will improve near-term results or will help them deliver on their annual commitments than they are in creating bigger benefits that may be several years away.

Timeliness is a factor when insights are meant to support a specific decision or when they are meant to offer broader understanding. Marketing/product managers and directors work on tight business timelines, where decisions need to be made according to a certain work-back schedule. If insights are to inform such decisions, then obviously their availability needs to be in sync with the timeline of the internal decision maker; otherwise a window of impact will be missed.

If the actions implied by the insights do not have a natural landing place within the firm, nobody will feel a terrible urgency to act. Also, in some cases action doesn't happen because the idea wasn't invented by the person or team that should act on the idea – the "not invented here" syndrome. In other words, the actions implied by the insights do have a natural landing place in the firm but were not created by the team and as a result the team does not feel the passion to act.

Even if insights are credible and actionable, a decision maker may still not accept them. Any insight suggesting action that runs counter to a decision maker's agenda or goes against a recently-made decision or challenges current organizational structure faces significant resistance. In such cases, acceptance could imply regret or embarrassment and hence will be resisted.

In addition to the credibility of the insights, messenger credibility plays a role. When an individual or team is trusted, this trust will lower the information usage risk and hence increase the likelihood of the insights being used. This is extremely important, as insights can only become winning insights if they are appropriately used. The implication of this is that there are situations where the person who produces the insights may not necessarily be the best person – or should not be the only person – who presents the insights to an internal stakeholder. This issue is particularly important when insights are presented to senior executives. In addition and related to trust are characteristics such as likeability and similarity. The more the person who communicates the insights is liked or similar to the recipients of the insights the higher the likelihood of this advice being accepted.

Indirect persuasion

In many cases insights generated could be useful to a broader group of decision makers – many of whom the insights professional or team may not have direct contact with. For these broader audiences an insight can only inform a decision if it is known by them when decisions are made or when certain business issues are being reviewed. A recent Accenture report showed that high-performance firms have something in common: the speed with which they get the right information in the hands of the right people. Therefore, it is important to make it easy for decision makers to find the insights. Just as a consumer needs to get exposed to advertising multiple times before the advertising message sticks, decision makers and influencers may need to get exposed to insights multiple times before they stick and are remembered when the time comes to use them.

To prevent the belief among decision makers and influencers that relevant insights are too hard to find, an insights team needs to make them easy to find. If the relevant insights can't be found, a decision maker may proceed without them, contact someone to find the relevant insights for them or commission new research or analyses. Whichever one the decision maker chooses, the result is a loss due to suboptimal decisions, bad decisions or wasted time and resources.

Joost Drieman, former director of marketing intelligence at Cisco, has said, "We must make sure our stakeholders see and read what we would like to share with them." He uses a variety of channels to make sure insights are known. Using different channels to infuse insights in various formats – PowerPoint decks, e-mail summaries, in-person presentation, interactive tools, etc. – increases the frequency with which some stakeholders get to see and consume the insights.

Paradoxically, information overload can be an obstacle as well; business decision makers are getting overwhelmed by market research and customer data. It becomes too hard to glean the relevant insights, which results in either ignoring the data and insights altogether or picking them selectively. Decision makers tend to focus on those insights that are most readily available instead of using all of the available – but harder to obtain or track down – insights that pertain to the business problem at hand. This is often worse than not using any information at all. This is why it is so important to talk about and leverage validated insights, because again it involves reducing perceived information usage risk.

Examples of insight-delivery channels that I and others have used successfully include: e-mails; providing overviews of what there is and what is coming (a research roadmap); online portals where the decision maker can quickly find relevant insights and become familiar with them; marketing decision support tools to enable reviewing possible future scenarios; and, lastly, insights day, a full day devoted to discussing insights with a diverse group of stakeholders.

Processes for quality decisions

More work may still be necessary to ensure that the decision makers actually infuse their decision-making with the insights in the right way and that intended actions are actually taken. Thus, for a firm to profit from insights, it should have systems and tools in place to ensure the insights are acted upon correctly. Specifically, I recommend using a planning process, a review process and follow-through process:

Planning: This process would require that executives articulate the consumer facts, trends and insights that support the action choices that they are about to make. For example, a firm can require that any chief marketing officer has a marketing plan that contains the relevant insights that support their specific programs, preferably even the insights that might not support the intended marketing actions. An example of such a process has recently been kicked off at GE Healthcare, which recognized that it simply needed more rigorous plans for its solutions. Ryan Heath, global marketing manager and the person responsible for driving this initiative, has said "... the Marketing Plan Blueprint online tool asks marketers the imperative questions that help guide them in their market, customer and competitive analyses. Then, it aligns the appropriate tools to help marketers derive and communicate insights from these analyses."

This tool has been rolled out to all marketers in GE Healthcare (including the chief marketing officers). Anyone who produces a marketing plan needs to use this marketing blueprint tool.

Review: Each plan – marketing or otherwise – is reviewed by the business executive and someone from an insights team. The insights team needs to act as the rebuttal leader. In other words, she needs to review whether all relevant insights have been used and whether the insights quoted are correct, etc. I have seen many business/program plans with "customer data" that had no reference to where the data, analyses or insights came from. That is a recipe for errors.

Follow-through: I have been in situations where the insights were presented and the executives agreed on the validity of the insights and on the action needed to be taken and yet nothing happened or progress got stuck. I had to follow up and check in with these stakeholders to find out why intended actions did not happen. Now, things come up all the time in business – the manager of the team who needed to pursue the action suddenly decided something else was more important or they ran into something that in hindsight was not as clear as they thought and the progress halted. To mitigate a situation like that, and to ensure the pursuit of positive impact doesn't get stuck somewhere in the firm, it's useful to have a process that involves staying engaged with the person or team who needs to act, up to the point where the actions actually happen.

Another part of the follow-through process is the in-market tracking of results. When, in collaboration with your stakeholders, a set of actions is defined, one also needs to articulate what impact these actions are going to have and when, and a plan needs to be agreed upon that details how evidence regarding impact (or lack thereof) is being gathered. This is important for two reasons. One, the sooner you have evidence whether or not something works, the sooner you know you are either on the right track or need to rethink your actions. Two, actively and consistently engaging in evidence-gathering ensures the firm will engage in ongoing learning about what works and what doesn't.

An additional benefit of using a process for both the planning and the review phase is consistency. Consistency here refers to doing things well, not just occasionally but consistently. Henkel, a German adhesives company, made two branding decisions with very different outcomes. This example is based on a Harvard Business Review article by Kashani (1989). A first decision pertained to Henkel's Pattex brand. The strategy that Henkel wanted to implement was to make Pattex an international umbrella brand by putting fast-growing products under it. Initially, this idea received strong opposition from Henkel's country managers. To validate whether the brand's extension plan was a good one, Henkel tested it with consumers and the positive consumer feedback it garnered persuaded the country managers. The strategy was implemented and was an immediate success.

A second decision involved Henkel's Pritt brand. A similar strategy to the one used for Pattex was considered. In this case, after the success of Pattex, the country managers endorsed the idea immediately. However, in this case, consumer survey results indicated the harmonized product line with Pritt as the umbrella brand might not be enough to turn around the broader Pritt brand. Yet, Henkel still went ahead with the Pritt umbrella brand strategy and it failed. If a planning and review process had been in place, Henkel would likely not have made this mistake. At the end of the day it is not only about making a better decision, it's about making consistently better decisions than your competition.

Interactive decision-support tools

Acting on single insight, or selective insights, without reviewing a broader set of insights should be discouraged. Having tools such as an insights search engine is a good idea but may not be sufficient when insights are based on advanced analytics that enable users to look at many different scenarios. In those cases interactive decision support tools (IDSTs) may be needed. An IDST can be defined as a tool that transforms many business data and insights into: simple reports and graphical representations of selected data; summary insights; and predictions of the impact different action scenarios will have on predicted revenue, profits, etc.

These tools are usually made for a specific user or internal stakeholder group to help them make decisions more easily and effectively. If well-designed, such tools can highlight the connection between certain marketing actions and the most likely result in terms of business success and can therefore be a great option to help make better decisions.

These types of marketing decision support tools have been proposed and used for resource allocation, sales force optimization and pricing and branding decisions. Especially in situations where a lot of data needs to be reviewed in a somewhat standard fashion, an IDST can provide great benefits. We distinguish two types of IDSTs:

- A tool that helps a decision maker quickly sift through a large amount of data and/or insights, zooming in on a relevant subset in a way that helps the decision maker ask the right questions or narrows the set of possible directions in which a decision needs to be pursued.
- A tool that calculates many different (hypothetical) scenarios in a way that helps the decision maker quickly home in on the scenarios most likely to lead to be the best decisions. In this second case, we have an underlying (e.g., statistical) model that predicts the outcomes of various hypothetical scenarios (these scenarios are usually defined on a number of key drivers). For example, if the analytics team produced a demand function that models demand as a function of prices, seasons, promotions, etc., an interactive tool could be built that would allow managers to review several pricing scenarios and see what the impact on sales and profits would be.

Results of studies have shown that the use of an IDST can improve both the efficiency and effectiveness of decisions. Just as with the insights, adoption of a marketing support system is something that needs to be managed. This is a challenge that involves two components. One needs to convince decision makers that they should use a computer-based tool and that the recommendations made by the tool will result in better-quality decisions than gut-feel or random available information and insights. Four factors have been found to affect the adoption of an IDST: ease of use, training, feedback on upside potential and feedback on how to improve one's own mental model.

Better business performance

Decision makers should draw on all of the insights available to them because there is strong evidence that effective use of information leads to better business performance. Even if you have access to the same insights as your competitors you can still gain an edge by making better use of them. With the concepts outlined above as a guide, you can develop a strategy for improving your organization's handling of data and insights and ensure that future decisions are fully and profitably informed.

Marco Vriens is managing director strategic analytics and senior vice president methodology at The Modellers, a Salt Lake City, Utah, research firm. Based in LaCrosse, Wis., he can be reached at marco.vriens@themodellers.com.

Names of Note

In Memoriam...

Pieter Pim de Kadt, founder of *de Kadt Marketing and Research Inc.*, Greenwich, Conn., died in December 2012 at age 84.

Veteran researcher **Warren Goldman** died in January at age 79.

■ *HarperCollins Publishers*, New York, has hired **David Boyle** as senior vice president, consumer insight.

■ **Fanette Singer** has been named senior vice president, marketing, at *Country Financial*, Bloomington, Ill. Research will be among her responsibilities.

■ **Janet T. Serluco** has joined Zionsville, Ind., health care consultancy *DK Pierce and Associates* as senior consultant, managed markets. Research will be among her responsibilities.

■ *Mystery Researchers*, Atlanta, has hired **Geoff Curtis** as director, business development.

■ New York research company *Insight Strategy Group* has promoted **Karen Van Vleet** to associate director; **Annie Orenstein** to manager; and **Tiffany Aguilar** to analyst. The company has also hired **Paige Thompson** as analyst.

■ **Emile Bakker** has joined Uitgeest, Netherlands, research company *Nebu* as product manager.

■ **Kathryn Gallant** has been appointed joint CEO at New York research company *Insight Health US*.

Gallant

■ Wilton, Conn., research company *Toluna* has appointed **Cannie Tan** as vice president, operations, Asia-Pacific. Tan will be based in Hong Kong.

■ **Bob Douglas** has been named chief strategy officer at New York research company *P\S\L Group*. Douglas will be based in London.

■ New York research company *Ipsos Healthcare* has hired **Siva Narayanan** as senior vice president, managing the company's evidence generation, value and access portfolio.

■ *Lightspeed Research*, Warren, N.J., has named **Andrew Cayton** global COO; **Martin Filz** CEO, Europe, Middle East and Africa; and **Efrain Ribeiro** global chief research officer.

Ribeiro

■ *InsightExpress*, a Stamford, Conn., research company, has promoted **Drew Lipner** and **Marc Ryan** to co-CEO.

■ New York researcher *The Nielsen Company* has made the following appointments to its board of directors: **James Marshall Kilts**, chairman; **Michael S. Chae**; **James A. Attwood, Jr.**; **Alexander Navab**; **Richard J. Bressler**; **Patrick Healy**; **David L. Calhoun**; **Karen M. Hoguet**; **Robert C. Pozen**; **Vivek Y. Randivé**; and **Javier G. Teruel**.

■ *Food Perspectives Inc.*, a Plymouth, Minn., research company, has hired **Joyce Lizzi** as vice president, client accounts.

■ Austin, Texas, research company *Bazaarvoice Inc.* has appointed **Ari Paparo** as senior vice president, media products.

■ **Nick Halsey** has been named CMO of *Keynote Systems*, a San Mateo, Calif., research company.

■ Philadelphia research company *Focus Pointe Global* has appointed **Shane Abel** as national sales director and promoted **Jarrett Lodge** to national sales director. The company has also hired **Ron Livers** as facility director, Atlanta.

■ **Kevin Orians** has joined *Market Strategies International*, Livonia, Mich., as COO.

Orians

■ Montreal research company *Leger Metrics* has hired **Josef Raffai** as vice president, marketing and sales, and **Marlene Kohn** as senior sales executive.

■ *CMS Research*, Toledo, Ohio, has hired **Jeff Cummins** as vice president, business development.

■ Chicago research company *SymphonyIRI Group Inc.* has named **Piyush Chaudhari** president of the Americas.

■ *SIS International Research*, New York, has hired **Federica Sacchi** in its London office as director, business development, Europe, Middle East and Africa.

■ **Bonni Nelson** has been promoted to team leader, QualiSight, at *Research and Marketing Strategies*, Baldwinsville, N.Y.

Nelson

■ **Justin Blomgren** has joined *StandPoint*, an Atlanta research company, as director, business development.

■ **Todd McLean** has been named COO of *Revelation Inc.*, a Portland, Ore., research company.

McLean

■ Paris research company *Ipsos* has appointed **Mary Dupont-Madinier** to its board of directors and named her a director of the company.

■ *D3 Systems*, a Vienna, Va., research company, has hired **Alex Brezinski**, **Michael Caughey**, **Leslie Dishman**, **Elizabeth Hood**, **Nicholas Malouta** and **Nina Sabarre** as assistant research analyst; **Kelley Milligan** as controller; and **David Rae** as statistician.

■ New York research company *Kantar Health* has added **Theano Anasta** and **Svetlana Gogolina** as senior researchers to its team in the U.K.

■ *Engage Research*, London, has hired **Jen Halliwell** as director.

■ **Joanne Hughes** has joined *Face Facts Research*, Leeds, U.K., as data manager.

■ *ICM Research*, London, has hired **Iain Carruthers** as head of qualitative research.

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Research Industry News

News notes

■ **The Market Research Society**, London, has launched a trust mark to endorse a company's commitment to the fair use of consumer data. To earn the trust mark, a company must commit to 10 core principles:

- We will ensure that all personal data is collected with customers' consent.
- We will not use personal data other than the purpose for which consent was given, respecting customers' wishes about the use of their data.
- We will make sure customers have access to the personal data we hold on them and how we use it.
- We will protect personal data and keep it secure and confidential.
- We will ensure staff understand that personal data is just that – personal – and ensure that it is treated with respect.
- We will ensure that the vulnerable and underage are properly protected by the processes we use for data collection.
- We will manage our data supply chain to the same ethical standards we expect from other suppliers.
- We will ensure that ethical best practice in personal data is integral to our procurement process.
- We will ensure that all staff who have access to personal data are properly trained in its use.
- We will not use personal data if there is uncertainty as to whether the Fair Data Principles have been applied.

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■ **The Location Privacy Act of 2011**, sponsored by Minnesota Senator Al Franken, has been reported favorably by the Senate Judiciary Committee, according to information from the Electronic Privacy Information Center, Washington, D.C. The bill requires affirmative consent for the collection and disclosure of location information, an important protection for cell phone users and users of location-based services.

Acquisitions/transactions

■ Princeton, N.J., research company **ORC International** has acquired **Marketing Research Services Inc.**, Cincinnati.

■ **Vision Critical**, Vancouver, B.C., has acquired DiscoverText, a cloud-based text analytics solution, from Amherst, Mass., software company **Texifter LLC**. Vision Critical will combine DiscoverText with its insight communities.

■ Westport, Conn., research company **reInvention LLC** has acquired New York research company **Authentic Response**. Authentic Response will continue to operate independently with the goal of becoming a unified brand by the end of 2013.

■ Watertown, Mass., health record management services company **athenahealth Inc.** has acquired **Epocrates Inc.**, a San Mateo, Calif., research company.

■ **The 451 Group**, a New York IT analysis company and owner of 451 Research, has acquired Boston research company **Yankee Group** from Alta Communications, a Boston private equity firm. Yankee Group will operate as an independent division of The 451 Group.

■ **InMobi**, a Singapore mobile technology platform and advertising network, has acquired Bristol, U.K., mobile analytics company **Overlay Media**. The Overlay Media team will be based out of InMobi's London headquarters.

■ **YuMe**, a Redwood City, Calif., advertising software company, has acquired San Jose, Calif., research company **Crowd Science**.

■ New York research company **GfK**'s animal and crop health division has acquired the Global Seed Market Database and the Global Seed Sector Outlooks for major global field and vegetable crops from **Context Network LLC**, West Des Moines, Iowa.

Association/organization news

■ **The Qualitative Research Consultants Association**, St. Paul, Minn., is accepting presentation proposals for its 2013 annual conference, themed "Mission Exploration" and held on October 16-18 in San Diego. Potential speakers are encouraged to submit topics that explore new and divergent perspectives, transformative thought-leadership and best practices. Deadline for proposals is March 15. For topic guidelines and more information visit www.qrca.org.

■ **The Marketing Research Institute International** (MRII), St. Louis, has appointed its 2013 board of directors: **Charlotte E. Sibley**, president; **Michael Halberstam**, secretary-treasurer; **John Lewington**, immediate past-president; and **Barry Watson**, president-elect. MRII has also elected **Lisa Courtade**, **Roger Green**, **Ken Roberts** and **Bart Weiner** as board directors.

New accounts/projects

■ **Schlesinger Associates**, an Iselin, N.J., research company, has been selected as the recruiting and facility management partner for **The Insight Lab**, a St. Louis research facility.

■ New York research company

Millward Brown's Link facial coding technology has been adopted by **Unilever**, Rotterdam, the Netherlands, and **The Coca-Cola Company**, Atlanta.

■ Columbia, Md., research company **Arbitron Inc.**'s Portable People Meter radio ratings service has been adopted by **Cumulus Media**, Atlanta, for all Cumulus stations in the radio markets surveyed by Arbitron.

■ **Opinionmeter International**, a San Leandro, Calif., research company, has added **Pugsley + Surgenor Advertising Inc.**, Toronto, to its network for licensees for its mobile survey solution.

■ **The Duke-Ipsos Research Center**, New York, has added **GlaxoSmithKline Consumer Healthcare**, London, to its advisory board.

■ **AdinTop,** a Saudi Arabia digital media network, has adopted Melbourne, Australia, research company **Effective Measure**'s data insights and consumer and campaign profiling solutions to supplement its own offerings.

■ **Surescripts**, an Arlington, Va., e-prescription network, has selected **Study Hall Research**, Tampa, Fla., to complete a series of in-depth interviews with health care decision makers regarding Surescripts' offerings.

New companies/new divisions/relocations/expansions

■ **GMO Research**, Tokyo, and **Horizon E-lab Ltd.**, a division of Horizon Research Consultancy Group, Beijing, have partnered to establish a joint venture company in Shanghai, China. The company will be named **GMO E-Lab Marketing Research**.

■ Barcelona, Spain, research company **Netquest** has opened an office is Santiago, Chile. Enric Cid will lead the operation, assisted by Jordi Quirós.

■ **The Retail Outsource**, a Coral Gables, Fla., sales performance agency, has launched its sister company, **The Consumer Insight** (TCI). TCI is a research company headquartered in Miami and is online at www.theconsumerinsight.com.

■ **Advanced Focus**, a New York research company, has opened **The Loft**, a research venue located in Manhattan at 15 West 39th Street.

■ Frank Fantini and Todd Eilers have partnered to found **Eilers Research**, Anaheim Hills, Calif. The company will focus on the gaming equipment and technology sector within the casino gaming industry. The company is online at http://eilersresearch.com.

■ Wilmette, Ill., research company **Insights in Marketing** has launched its **I on Women** division.

■ **Point Consultancy**, a Dubai research agency, has launched **Ignite**, a division focused on fast-moving consumer goods. Ignite is online at www.pointconsultancy.com/ignite.

■ **Insight Research Group**, London, has launched **IQ**, a quantitative research practice for health care clients. Philip Dunn will lead the operation.

■ **The Research Partnership** and **The Access Partnership**, London, have relocated their U.K. headquarters to Chester House, Fulham Green, 81-83 Fulham High Street. E-mail addresses will remain the same but the main switchboard number and direct telephone numbers have changed.

■ Paul Nisbet has launched **One Research** in Rochester, N.Y., specializing in health care and patient outcomes. The company is online at www.oneresearchus.com.

■ **L&E Research**, Raleigh, N.C., has partnered with **Leibowitz Market Research**, Charlotte, N.C., to open a recruiting facility in Charlotte.

■ **Market Strategies International**, Livonia, Mich., has opened an office in Singapore. David Ying Hon Ho will lead the office.

■ Waltham, Mass., research company **Affinnova** has opened an office in Chicago. The office is located in the Willis Building at 233 South Wacker Drive, Suite 6225.

Research company earnings/financial news

■ **Ace Metrix**, Mountain View, Calif., announced 116 percent growth in revenues over 2011. Fourth-quarter 2012 revenues rose 160 percent over fourth-quarter 2011.

■ **The Sound Research**, Vancouver, B.C., reported commissions of $7.4 million in 2012, a 25 percent increase over 2011.

CALENDAR OF EVENTS

••• can't-miss activities

ESOMAR will hold its annual Central and Eastern European research forum, themed "Research Remix," on March 17-18 at the Radisson Blu Alcron Hotel in Prague, Czech Republic. For more information visit www.esomar.org.

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.

The Market Research Society will hold its annual conference on March 19-20 in London. For more information visit www.mrs.org.uk.

The American Marketing Association will hold a program, titled, "Marketing Research Academy for Business Professionals," on March 19-22 at the University of Georgia Terry College of Business Executive Education Center in Atlanta. For more information visit www.marketingpower.com/Calendar/Pages/marketing-research-academy.aspx.

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.

IIR will hold an event, themed "Total Customer Experience Leaders Summit," on April 8-10 at The Ritz-Carlton in Boston. For more information visit www.iirusa.com/totalcustomer/homepage.xml.

IIR will hold a conference focused on design and culture and brand identity and packaging on April 15-17 at the Swissotel in Chicago. For more information visit www.iirusa.com/fuse.

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.

Walker Information will hold a conference, themed "B2B Customer Experience Summit," on May 1-2 at the Hilton San Diego Bayfront Hotel in San Diego. For more information visit www.walkerinfo.com.

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. visit www.casro.org.

The Merlien Institute will host a conference, themed "InsightsValley Asia Corporate Researchers Summit," on May 16-17 in Bangkok, Thailand. For more information visit www.insightsvalley.com.

ESOMAR will hold a conference focused on automotive research on May 23-24 at the Autostadt in Wolfsburg, Germany. For more information visit www.esomar.org.

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.

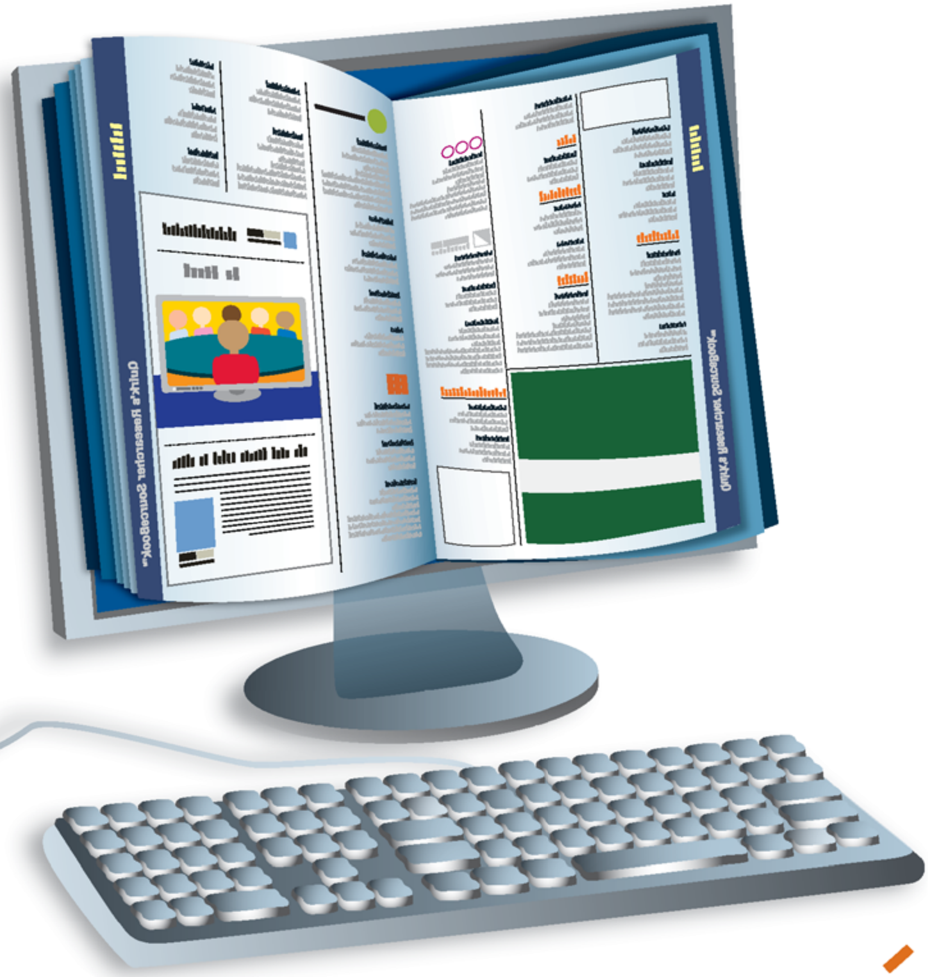
The Marketing Research and Intelligence Association will hold its annual conference, themed "Bridging the Gap," on June 2-4 in in Niagara Falls, Ontario. For more information visit www.mria-arim.ca.

The American Marketing Association will hold its annual advanced research techniques (ART) 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, titled "MRA Insights and Strategies Conference," 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 on-line 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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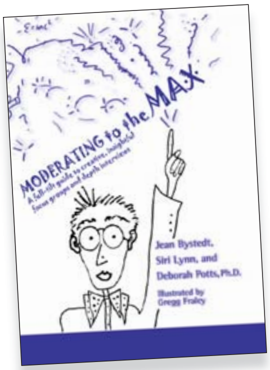

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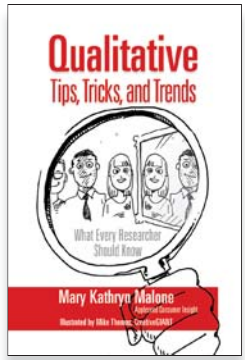

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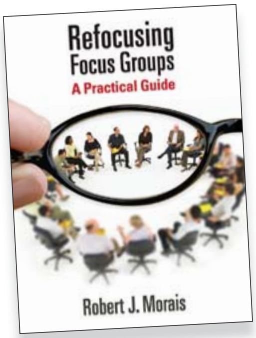

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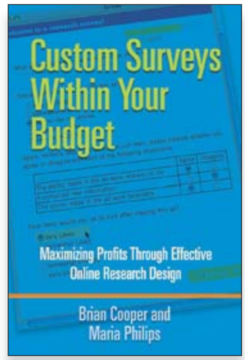

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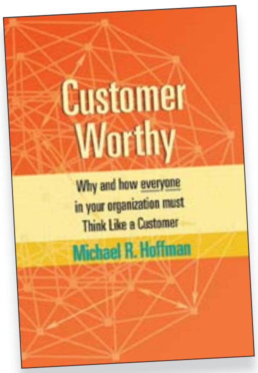

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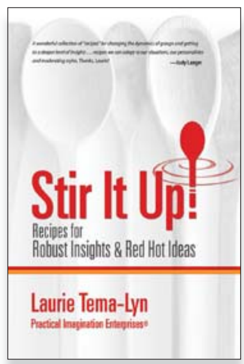

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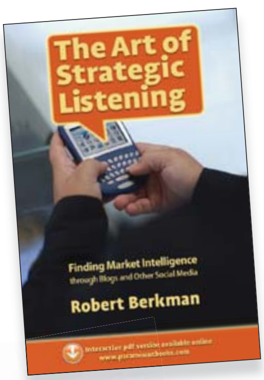

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BEFORE YOU GO ••• issue highlights and parting words

••• cover-to-cover

Facts, figures and insights from this month's issue

page 22 — Usability testing is unique from other forms of qualitative research because a participant's behavior matters more than their words.

page 36 — There is no magic number for the ideal number of vendors on the preferred vendor list.

page 55 — Eye-tracking's greatest source of value lies in its diagnostic insights.

page 60 — Analytics is not just the opinion of a smart person with a lot of experience.

MR job market holding steady

As of February, Quirk's free online job posting board had just under 400 jobs listed. This is about as high as it has been in the last year – which is great news! But it's still down from the same period in 2011, when we had about 500 active postings, and way down from 2008, when the average number of job openings hovered around 700.

However, things could be worse: In 2009 we averaged only 225 active postings for most of the year. If you have a job opening you'd like to list for free on our Web site, visit quirks.com/jobs.

Contribute your content to Quirk's!

It's shaping up to be a great year for Quirk's and we'd like to invite our readers, whether you've written for us or not, to keep the content and ideas coming in! If you have a research experience or perspective you'd like to share with the Quirk's audience, consider submitting a manuscript to be published in one of our many outlets. From the print magazine and biweekly e-newsletter to our practitioner-driven blogs, we want to help researchers be heard. Our various editorial vehicles allow for everything from longer, in-depth case studies to short-form, op-ed-style articles.

Check out our editorial calendar at tinyurl.com/quirksedcal to see if you might have something to contribute on one of the upcoming topics. Do you already maintain a research-focused blog? Consider sharing your posts with our readers at researchindustryvoices.com. The possibilities are endless!

To submit an article for consideration, send materials to Quirk's Editor Joseph Rydholm at joe@quirks.com or to Quirk's Content Editor Emily Goon at emily@quirks.com. Submission guidelines are online at tinyurl.com/writeforquirks. Quirk's reserves the right to edit any materials submitted for publication.

Coming in the April Quirk's

••• research communities

Clint Jenkin tells how a lack of budget drove the development of a highly successful internally-created research community.

••• business-to-business research

Michael Latta explains how to use the Kano method for an international business-to-business research study.

••• data analysis

Steven Struhl concludes his two-part series on the powerful and increasingly popular Bayesian networks.


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