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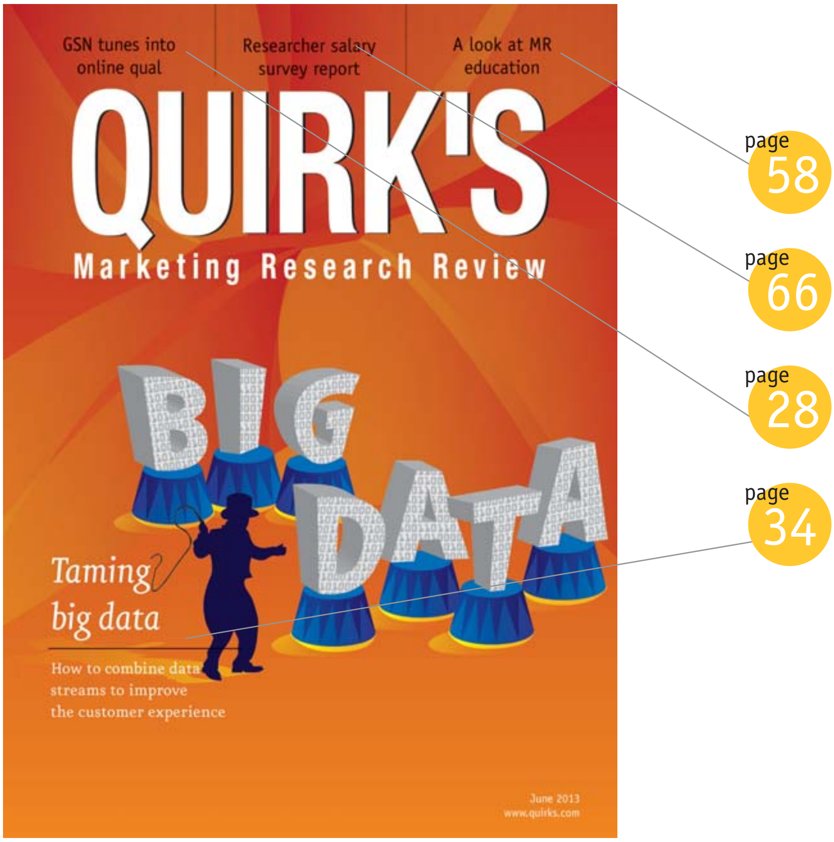
June 2013 • Vol. XXVII No. 6



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4662 Slater Road | Eagan, MN 55122
651-379-6200 | www.quirks.com

Publisher • Steve Quirk
steve@quirks.com | x202

Editor • Joseph Rydholm
joe@quirks.com | x204

Content Editor • Emily Goon
emily@quirks.com | x210

Directory Manager • Alice Davies
alice@quirks.com | x209

Production Manager • James Quirk
jim@quirks.com | x206

V.P. Marketing • Dan Quirk
dan@quirks.com | x203

V.P. Sales • Evan Tweed
evan@quirks.com | x205

Sales • Lance Streff
lance@quirks.com | x211

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3 things to do online—**right now!**

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••• social media

Discuss with Disqus

Last year we added Facebook comments to our online articles but unfortunately, it didn't work out quite as planned. The system has proven a bit glitchy so this month we are happy to announce that we've switched over to Disqus for commenting. Disqus is used by some of the largest names across the Web and every month its platform reaches over 700 million people.

We know our readers are connected to social networking sites like Twitter, Facebook and Google+ and there's a good chance you're logged into one of these accounts at any given time – even when perusing our site! Disqus allows you to comment on Quirk's content using one of several social media platforms. With Disqus, commenting on articles, events or directory listings is just a click away so don't be shy! We want to hear from you!

// E-newsworthy

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••• b2b research

B2B marketers identify the ideal but fall short

The ideal modern marketer persona is threefold – a hybrid of content marketer, brand marketer and Web marketer, according to Defining the Modern Marketer: From Real to Ideal, a report based on a survey of U.S.-based B2B marketers by Eloqua. But successful marketing includes more than three roles and should factor in marketing technology, analytics, targeting, conversion and engagement, as these five marketing areas were chosen by respondents to make up the ideal modern marketer scorecard.

The ideal modern marketer has the optimal percentage of all five skill areas – adding up to a total of 100 percent. However, when survey respondents were asked to rate themselves on the five core skills, their current performance was barely passable at only 65 percent.

Respondents recognize it's crucial to have both art and science as part of their marketing efforts. But while today's modern marketer needs to be equal parts creative, analytical and tech savvy, survey participants feel unprepared to handle the science side of the equation. Marketers gave themselves the lowest ratings in analytics and marketing technology.

Despite an onslaught of new vendors in the social media space, B2B marketers still very much rely on more traditional digital channels. The three most important channels for a marketer's organization were company Web site, e-mail and face-to-face events. Content marketing helps provide the right information for these channels and is still in high demand, as respondents declared content marketing as very important to their overall marketing-mix.

The survey also identified the major obstacles marketers face as they try to become more modern. Respondents pointed to lack of budget and poor data analytics infrastructure as the two top roadblocks.

quirks.com/articles ID 20130601

••• social media research

Don't listen unless spoken to?

When it comes to social media listening and online privacy, consumers want it both ways. According to a survey conducted by NetBase, a Mountain View, Calif., research company, 51 percent of consumers want to talk about companies without being listened to but another 58 percent want companies to respond to complaints shared on social media.

Social media monitoring done in the name of marketing research is a far cry from 1984's Big Brother but that doesn't stop consumers from worrying about their online privacy. Forty-three percent of consumers think companies monitoring their comments intrudes on privacy yet 32 percent of consumers of all ages and 38 percent of Millennials (18-to-24-year-olds) have no idea companies are listening to what they say in social media.

Boomers put up the biggest fight, as 36 percent don't want brands listening to what they say about brands online, while only 17 percent of Millennials said the same. At least 20 percent of each age group don't yet know how they feel about brands listening.

Nevertheless, the majority of consumers still expect to have their concerns and complaints addressed on social media – inviting companies to listen when they're being discussed directly – and almost half say companies should listen to improve products.

it's the stories

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Know Why™

By Joseph Rydholm, Quirk's Editor

What's the view from the MR job sidelines?


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Joe Rydholm can be reached at joe@quirks.com

As part of this year's iteration of our annual researcher salary survey (see Emily Goon's recap on p. 66) we asked respondents who indicated they were unemployed an open-ended question on what they saw as the greatest obstacle in finding employment.

Reading over some of their responses proves that, against the current backdrop of cautious optimism pervading the marketing research industry and the economy as a whole, it's always instructive to remember that not everyone has been swept up in the rising tide.

Perhaps as a result of departments being downsized or eliminated altogether, the comments point to a glut of senior-level or at least highly-experienced researchers (client-side and vendor-side) pounding the pavement:

"There are too few senior-level jobs."

"Lack of mid-management opportunities in any industry."

"Few opportunities at sr. director and v.p. level."

Ageism appears rampant (accompanied by the dreaded "overqualified" status):

"Being older than 50 – there is incredible age bias out there now."

"Age, overqualified for most opportunities (I'm willing to accept lower-level positions but companies are not willing to offer them)."

"The amount of experience I have is more than most positions want. Qualifications are stringent and if you don't exactly match up, there is not a consideration of a possible fit."

One commenter summed up the impact of the rise of big data: *"The social media and big data trend seems to have impacted traditional market research jobs. Increasingly, jobs are asking for a trilogy of skills as part of the emerging 'data scientist' role: 1) BI, data querying and database skills, 2) market research and 3) statistical analytics (SPSS/SAS). Each is really a separate discipline that takes years to master."*

The job-search process itself and a lack of solid contacts were highlighted for blame by several respondents:

"Making contacts. Cold résumé submissions to job postings, even on company Web sites, garner no results. Knowing someone inside a company, or even knowing someone who knows someone, is the only way to get traction."

"The online application process is a huge barrier. Your application goes into a black hole. There is no one to contact to follow up on the status of filling the position or to get feedback."

In other instances, location-related problems were mentioned:

*"A few things: 1) Very competitive environment in the Bay Area; lots of very qualified researchers, especially for corporate research positions. 2) Difficult to convince corporate hiring managers that I am adequately qualified for work in *their* environment, since my background is entirely supply-side. 3) I live in SJ and most supply-side positions are in SF; the commute is just not reasonable for day-to-day work. I plan to relocate closer to SF this summer to make those job prospects even possible."*

"The talent pool is abundant and my search is confined to a small but highly desirable area – Los Angeles."

"I am a qualitative researcher and there aren't many of those jobs here in or around Seattle."

"Limited commercial biopharma opportunities in my geography – San Diego."

"Finding primary research positions with clients in Denver."

'Very slim'

From being too experienced to the general difficulty of being in the job market right now, this person perhaps summed it up best: *"There's just simply a shortage of jobs. On top of that, the majority of jobs being advertised are located in either the pharmaceutical/medical or telecommunications industries. If you have not worked in those industries, your chance of being hired for one of these jobs is very slim. Also, as a more senior marketing professional, I feel that companies prefer not to pay the higher salary rates for seasoned professionals but are mostly looking to take on younger people with around five years of experience – not those of us who have dedicated 20 or more years to our calling. Tough market. Tough competition."*

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IN FOCUS

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

// Survey Monitor

••• health care research

Dollars vs. doctors

Over one-third may switch doctors – if the price is right

While over 40 percent of Americans would be unwilling to change regular doctors for a reduction in health plan costs, another 34 percent would prefer lowering the cost of their health plan instead of keeping their doctor, according to a survey conducted by HealthPocket, a Sunnyvale, Calif., health plan ranking Web site.

Of those willing to make the switch, it wouldn't take a whole lot of savings to sway them. When asked "If changing from your doctor to another doctor could save you money on your health plan premium costs, how much would you have to save annually to make the switch?", over half of the 34 percent who would switch would do so for the lowest savings amount presented by the survey: $500-$1,000 annually. Eight percent said they would switch for $1,000-$2,000 and 7.5 percent for $3,000+.

While the plurality would stay loyal to their regular doctor, the 34 percent willing to walk away contradicts other research that has shown that many patients are highly satisfied with the care provided by their personal physician, such as a survey from The Physicians Foundation that found that nearly 80 percent of patients were very satisfied or extremely satisfied with the visit(s) with their family physician or primary care doctor in the past year.

Other than cost, one of the key factors in consumers' selection process for health insurance is whether their doctor participates in a plan's network of providers. For insurers, cost pressures are moving them to limit the size of their provider networks to negotiate lower rates to health care providers in exchange for a larger volume of patients. www.healthpocket.com

quirks.com/articles
ID 20130603

••• television research

Taking control

Americans meticulously manage time-shifted TV-viewing on their own schedules

Americans' TV-viewing habits were once at the mercy of network schedules but technology has come a long way from VCRs and VHS tapes. Now there are more ways than ever to watch shows on one's own schedule and Americans are taking advantage – and taking control of their TV time.

Video on demand. DVRs. Streaming content. Entire seasons of television shows collected in DVD box sets. Seventy-eight percent of Americans have utilized the varied content-delivery methods, according to a poll conducted by Rochester, N.Y., research company Harris Interactive. The top methods include on-demand services (41 percent total, 34 percent cable, 9 percent satellite); TiVo, DVRs or other recording devices (37 percent); Netflix streaming services (30 percent); purchasing, renting or borrowing episodes or seasons on DVD (29 percent); and

Hulu or Hulu Plus (22 percent). And of those who do so, 62 percent confirm that they watch multiple episodes of a single TV show at a time, sometimes called binge-viewing.

Not surprisingly, age plays a major role in having taken advantage of such viewing opportunities, with Americans ages 18-to-39 (89 percent ages 18-to-29 and 90 percent ages 30-to-39) significantly more likely to have done so than those ages 40-to-54 (78 percent). And 40-to-54-year-olds are, in turn, more likely to have done so than the 55+ age group (67 percent).

Perhaps more notably, Americans with children under 18 in the household are more likely than those without to have done so (84 percent with, 76 percent without), with the difference driven largely by Netflix streaming content (40 percent with, 27 percent without) and Amazon online and streaming content (15 percent with, 9 percent without).

Among those who ever watch TV shows on their own schedule, 43 percent confirm having certain shows they make a priority to watch before anything else, as soon as they are available. The top factor in what they prioritize isn't complicated – it's simply those seen as the favorite/most enjoyable (81 percent). Other factors include "I can't wait to find out what happens next" (53 percent) and "It depends on how much time I have to watch" (42 percent), followed by "I don't want to get behind and risk plot points being spoiled" (37 percent) and "It depends on my mood" (34 percent).

Women are more likely to be motivated by a desire to find out what happens next (60 percent women, 46 percent men), while for men the decision is more dependent on their mood (40 percent men, 29 percent women). Only 18 percent identified a desire to discuss the show with friends, family and/or coworkers as a factor influencing their viewing priorities.

Among those watching TV shows on their own schedules, 62 percent binge-view. Both new and old shows contribute to this, with half bingeing on older shows or past seasons of current shows and 40 percent bingeing on current seasons of shows.

The choices between which shows to binge-view is driven most by the type of show, with the majority of binge-viewers (56 percent) saying this influences their likelihood to binge-view a particular program. Other strong factors are a desire to catch up to the live broadcast (44 percent) and the genre of the show (43 percent). Few (13 percent) indicate that their choices are driven by the social aspect, such as watching marathons with friends and participating in watercooler conversations.

Among those who ever binge-view, 28 percent indicate that they are doing so more now than a year ago; just over half are doing so the same amount as a year ago; and 20 percent are doing so less. Looking forward, the binge-viewing trend shows signs of leveling off, as only 9 percent indicate that they expect to be binge-viewing more a year from now and two-thirds expect to be doing so the same amount at that time as they are now. One-fourth expect to be doing so less in a year.

www.harrisinteractive.com

••• mobile research

Disconnect? Dream on!

Consumers growing more dependent on smartphones

It's been a hotly-debated topic in recent years whether constant connectivity via mobile devices is hurting or harming our way of life. While no clear answer has emerged, it's obvious that, whether beneficial or not, smartphones are becoming more entwined in daily life than ever – even to the point that unplugging during a vacation has become unlikely for most, according to Prosper Insights and Analytics, a Worthington, Ohio, research company.

Sixty-one percent of mobile users say that they use their smartphones for all functions of their daily life, up 34 percent from a year ago. Meanwhile, the percentage of users who say they use their smartphone only for basic functions is down a whopping 85 percent.

Further, it appears that mobile users can't even disconnect when on vacation. Over 82 percent say they take their smartphone/tablet with them and use it all the time, up from 71 percent last year. Usage is up across a variety of activities, such as checking e-mail and entertainment. Checking in for a flight is up 52 percent year-over-year and making reservations for restaurants or attractions is up 35 percent.

"The inability to disconnect while on vacation appears to be the byproduct of our digital society and in some cases can relieve the stress caused by being away from work or home," says Pam Goodfellow, analyst for Prosper Insights and Analytics. "However, constant connectivity is a double-edged sword because you're seemingly sacrificing the true meaning of vacation – to relax and disconnect. Perhaps the question we should be asking ourselves is 'Where do we draw the line?'"

www.prospermobile.com

••• brand research

A two-way street

U.S. consumers love the brands that love them

It should come as no surprise that a brand's path to great customer loyalty cannot be paved passively. In fact, consumers have come to expect brands to put in some effort to please them – and their loyalty depends on it. According to a survey conducted by Opinion Research Corporation, Princeton, N.J., on behalf of New York marketing consultancy Analytic Partners, nearly half of 18-to-44-year-olds feel that any loyalty they feel toward brands in the future will have to stem from the types of experiences brands create for them. This includes interaction in the form of video/online gaming, social media and third-party expert information through blogs and articles.

"The general conclusion we can make from these findings is that people want to be loved by the brands that love them – loyalty has become a two way street," says Nancy Smith, founder and CEO of Analytic Partners. "No longer are the days when brands can advocate solely for themselves. In fact, the way brands spend their marketing dollars to interact with their consumers can ultimately have a real impact on profitability."

Consumers feel empowered to make purchases when they have the knowledge to make proper decisions. Two-thirds of consumers are shopping online using mass-market sites like Amazon and Walmart.com and despite the ease of comparison price-shopping, they feel loyal to the brands they buy on these sites. Consequently, the determining factor for this lies within the reviews, as 75 percent feel that the reviews they read online play a major role in the purchases they make.

Gender and location do play a role in brand loyalty. Female consumers are generally more loyal to brands than males (68 percent vs. 55 percent). Results also indicated that consumers living in the South are the most loyal to the brands they buy (67 percent) and those living on the West Coast are the least loyal (56 percent).
www.analyticpartners.com

••• parents research

Funding family fun

Young parents – especially dads – spend more on family entertainment

Millennial parents (18-to-35 years old in 2012) just want to have fun and research shows they're willing to pay for it, as Millennial moms and dads have family entertainment spending habits that contrast with their older counterparts. While some 42 percent of parents are spending less on family entertainment now than they were a year ago, more than one-third of Millennials are spending more – compared to just 17 percent of non-Millennial parents, according to a study from Chicago research company Mintel.

Moreover, younger dads' spending habits show a disparity with older fathers and all mothers. Seventy-nine percent of younger dads spend less than $300 per month on family entertainment. However, 21 percent spend more than $300 a month, versus only 11 percent of men over 35 and 7 percent of females ages 18-to-34.

"Dads' spending habits reflect their tendency to take a more relaxed approach to family activities, compared to moms, who are typically the budget makers and enforcers," says Gretchen Grabowski, travel and leisure analyst at Mintel. "Many dads see their role as one of choosing fun activities that instantly gratify their kids. The likelihood that dads are the primary spenders in this sector, both in money and time, opens the door for marketers to target this group for family entertainment promotions."

Meanwhile, 29 percent say budget restrictions prevent their families from participating in their entertainment activities of choice and one-quarter say that kids' extracurricular obligations lessen their available time. Work obligations are also a primary barrier for young parents. One-quarter of Millennials say their spouse or partner doesn't have time for family activities due to time spent working – a larger share than any older age group surveyed.
www.mintel.com

Q

IN FOCUS

Product and Service Update

••• ad research

New Metrix and Analytix

ComScore debuts two audience measurement tools

Reston, Va., research company comScore Inc. has launched Media Metrix Multi-Platform, a solution designed to offer unduplicated accounting of audience size and demographics that reflects the multiplatform digital media environment, which includes Web sites, apps and video content accessed from multiple devices, including desktops, smartphones and tablets.

Additionally, comScore has enhanced its Subscriber Analytix suite for mobile operators. The additional capabilities are intended to allow mobile operators to use their own data in conjunction with comScore's proprietary digital media categorization and segmentation schemes to power insights for customer care and marketing representatives. Mobile operators can use information on how their customers engage with Web services, content, apps and devices to diagnose customer-care issues while developing marketing strategies.
www.comscore.com

quirks.com/articles
ID 20130604

••• qualitative research

Board breakouts

Webcam technology an alternative to traditional qual

The Sound Research, New York, has launched The Sound Vision, an online qualitative research tool designed to let ethnographers engage with and observe participants in multiple ways, from multiple geographic locations, simultaneously via Webcam.

The Sound Vision has been integrated into The Sounding Board, the company's bulletin board system, allowing researchers to pull respondents from an online bulletin board discussion to take part in a face-to-face session.

Clients can choose from virtual mini focus groups, virtual friendship dyads and triads, virtual in-depth interviews and virtual expert interviews and panels. Whiteboard functionality allows respondents to draw, post images or respond to stimulus together, such as videos, in real time.

Sessions can be dual-moderated to manage respondent activity and are recorded for video-on-demand viewing and can be translated into multiple languages.
www.thesoundresearch.com

••• research panels

Easier rewards

Kinesis adds electronic gift card platform to panel offering

Kinesis Survey Technologies LLC, Austin, Texas, has partnered with iCardMall, a Web-based electronic gift card platform, to integrate iCardMall's system with Kinesis Panel, the company's panel management solution. The partnership is designed to enable Kinesis clients to offer iCardMall's selection of electronic gift cards as part of its research panel's incentive/rewards program.

Panelists can accumulate rewards points (as specified by the panel owner) that can be converted into gift cards of varying monetary value for redemption with various iCardMall-affiliated merchants. Panelists can redeem points for an electronic gift card with the retailer of their choosing and have the gift card e-mailed automatically. Kinesis Panel also includes customizable e-mail templates to facilitate delivery, as well as real-time reporting about the redemption transactions.
www.kinesissurvey.com

••• mobile research

An augmented app

Research Now updates mobile survey platform to reach broader audience

Research Now, Plano, Texas, has debuted version 3.0 of its Research Now Mobile app, redesigned to feature multilingual capabilities; a survey launch scheduler; a multilevel nested quota management system; and advanced geolocation survey capabilities.

Research Now Mobile 3.0 features 10 languages. Survey apps for iOS and Android are also available in any regional language framework and allow for surveys to be authored in over 50 languages. With an integrated transliterate feature, studies can be programmed in non-English scripts using English keyboards.

Version 3.0 also includes a survey launch scheduler that is available for multiple launch types, including push notification, e-mail, SMS, geo-fencing, venue triggering and geo-targeting. A new multilevel nested quota management module is designed to reach targeted demographics without excessive over-quota responses in studies. Quotas can be set for profile and demographic variables, as well as based on the user response within the survey.

Improvements have also been made to the location-based targeting functionality to isolate panels and samples that meet certain criteria.

The most prominent upgrade is the expanded global reach of respondents, allowing researchers to generate a sample pool from across the Research Now Mobile panel, as well as Research Now's worldwide online consumer and business-to-business panels. Researchers can also import third-party samples for use in Web app surveys and invite respondents from third-party lists to download the app, with a mechanism to bypass the registration process.

Lastly, Research Now Mobile Version 3.0 includes support for hidden questions and background variable types. Data for background variables can be preloaded while launching the study and can be used for branching, piping, masking and quota control.

Research Now Mobile Version 3.0 is available for free on iOS and Android devices, as well as via Web app for all smartphones and tablets.
www.researchnow.com

••• brand research

The big picture

Mosaic analyzes how individual messages impact a brand's whole

Los Angeles research company PhaseOne has introduced Brand Communications Mosaic, a customizable analytical tool intended to evaluate the contribution each piece of communication makes to the delivery of the brand's desired message.

Integrated campaigns can consist of TV, radio, print, out-of-home, direct mail, social, Web, point-of-purchase, packaging and loyalty programs. Brand Communications Mosaic is designed to map out consumer impressions across these platforms and gauge the alignment of a communication with the brand's goals by evaluating the consistency of the communication with the overarching campaign, the contribution the communication makes to the core strategy and the clarity of the message.

The Brand Communications Mosaic is scalable and customizable and was created specifically as a topline, quick-view tool. Findings are color-coded and analysis can be completed within two to three days.
www.phaseone.net

••• ad research

But is it Sticky?

Analyzing an ad campaign's true exposure to optimize online spend

New York research company EyeTrackShop has launched Sticky, a brand and measurement technology that aims to show users the exact number of ad impressions that are seen (or not seen) per thousand impressions served to reveal the real price tag of ad placements.

Sticky's technology is designed to track which ads in any online ad campaign are seen and the aggregated time under attention that the brand has accumulated during the campaign period. Sticky is also designed to help users allocate money to the right formats, placements and sites throughout the campaign. Users can access the data in an interactive online dashboard and optimize ad spend based on cost-per-view and impact.
www.sticky.ad

••• predictive intelligence

Granular insight from big data

Integrating predictive insight into marketing campaigns

InsightsOne, a Santa Clara, Calif., research company, has released Marketing Workspace, a new feature of the InsightsOne predictive intelligence platform that includes new models and prebuilt connectors to standard marketing applications. These capabilities aim to help marketers build more effective campaigns, better leverage structured and unstructured data for predictive analytics and integrate predictive insight into their marketing.

Marketing Workspace builds on InsightsOne's multichannel consumer predictive intelligence platform, which uses big-data technology to anticipate an individual customer's hidden needs (i.e., who will most likely want to purchase a product or service, which customers are likely to be at risk of churning in the future and which retention offers they will be most receptive to).
www.insightsone.com

••• social media research

TRAC big data

Social media platform takes monitoring a step further

London research company Face has released Pulsar TRAC, a social intelligence platform designed to push social media research beyond keyword tracking by measuring the reach of conversations, mapping brand audiences and tracking content diffusion. Pulsar TRAC also aims to index and analyze the social connections, interests and digital behaviors of the authors.

Engineered for big data, the platform collects social and news content

in 140 languages, can process up to 7,500 tweets per second (60 million tweets per day) and perform complex queries on millions of conversations. Pulsar TRAC enables audience mapping to track and analyze the content and behaviors produced by a set audience; content tracking to see who, when, where and how a specific piece of content, identified by a URL, was shared in social media; visibility analysis to provide a reach estimation of each message as a way of weighting the content by considering the format, size of audience and virality of the post; and two types of sentiment analysis for short-form and longer-form content.
www.pulsarplatform.com

••• data analysis

Inching closer to all-inclusive

MarketSight 9.3 integrates more editing, more charts

Cambridge, Mass., research company MarketSight LLC has released version 9.3 of its software-as-a-service solution for data visualization and statistical analysis of research data. With the latest release, MarketSight users can edit data uploaded to the MarketSight platform, such as deleting one or more records or editing specific values within records. The capabilities are designed to help users identify and remove outliers and perform other common data-cleaning tasks, all within the MarketSight platform.

The latest release also features the addition of several new chart types, including doughnut charts, gauge charts and scatter plots. MarketSight has also added chart animation, popups and an interactive legend that can hide or show different values in charts. Charts are now optimized to support a wider range of mobile devices.

MarketSight has also expanded its DataSync feature to include Qualtrics support, enabling Qualtrics users to automatically load data from surveys directly into MarketSight.
www.marketsight.com

••• customer experience

Remarketing – on the fly

Action Center promotes behavioral targeting to site visitors

Webtrends, a Portland, Ore., research company, has debuted Action Center, a platform designed to integrate in-session and historical customer-level data into action systems, including e-mail, display ad networks, SMS messaging, CRM, mobile marketing, search engine marketing, marketing automation and more.

Action Center integrates Webtrends Streams directly into e-mail service and cross-channel marketing solutions providers ExactTarget, Responsys and Silverpop. Webtrends Streams is designed to track and respond to customer events and behavior without a time delay. For example, if a customer abandons a cart, marketers can trigger a personalized message or special offer via SMS, e-mail or social channel to reengage them.
www.webtrends.com

••• packaging research

Under pressure

Using behavioral economics to improve at-shelf research

BrainJuicer Group PLC, a London research company, has launched System 1 Pack Test, a packaging testing methodology designed to mimic the real-time shopping experience by asking people to make a selection from the shelf in time-pressured conditions. When under time pressure, people resort to System 1 judgment and provide a response that has been shown to better reflect real-world choices.

System 1 thinking is a term used by author, psychologist and Nobel Laureate for Economics Daniel Kahneman to describe the way that we make the vast majority of our decisions: quickly, intuitively and emotionally.
www.brainjuicer.com

••• eye tracking

Real-time design, on a dime

Tobii offers live, affordable eye tracking for Web designers and developers

Stockholm, Sweden, research company Tobii Technology has released Tobii UX Live, an eye-tracking solution developed for the Web design community. UX Live is intended to provide designers who have not had any prior eye-tracking experience with a simple, cost-effective way to get direct feedback on their work by combining hardware, software, education and support to give designers and developers a way to integrate real-time eye-tracking insights into their work.

UX Live aims to offer a critical view of the user experience that will illuminate design solutions, such as helping understand why users did not see a specific button or link and why they had problems solving the task; improve designs by evaluating in exactly what the user is seeing to identify how to make sites more user-friendly, improve conversion rates and achieve greater sales results; and validate creative.

The solution includes the Tobii X2 Eye Tracker, Tobii Studio Live Edition and training and support. It is available for $699 per month.
www.tobii.com

••• ad research

Watching as they watch

Researchers partner to offer facial coding for copy testing

Research companies InsightExpress, Stamford, Conn., and Affectiva, Waltham, Mass., have partnered to integrate Affectiva's Affdex automated facial analysis technology with CreativeImpact, InsightExpress' copy testing solution.

Affdex is a neuromarketing tool designed to read emotional states from facial expressions using a Webcam. CreativeImpact features a methodology that blindly exposes respondents to ads embedded within actual TV show content. While watching the ads, Affdex captures viewers' facial expressions via Webcam to simulate a real TV-watching environment and test in a true blinded exposure. This approach aims to evaluate ads without cognitive bias.
www.insightexpress.com

••• brand research

Layers of human motivation

Ipsos debuts new solutions for driving brand growth

New York research company Ipsos MarketQuest has created a new suite of Censydiam business solutions intended to uncover, prioritize and size category and cross-category opportunities for growth. Censydiam is designed to deconstruct motivations to purchase across four layers: functional characteristics, social identity, emotional benefits and personality.

Censydiam uses an individual, people-centered approach to identify which human motivations a brand should tap into to grow its share and links changes in brand perceptions to business outcomes. Censydiam is designed to predict which aspects a brand should leverage to improve its market share and determine the cost-of-entry factors a brand requires to play in the market; the drivers to grow the brand; and the drivers that can be built into new growth platforms for brand innovation.
www.ipsosmarketing.com

••• customer experience

Digging into dining

Solution brings Maritz's CEM expertise to restaurants

Maritz Research, St. Louis, has launched Capella Restaurant, a customer experience management system designed to help restaurant operators address problems with customer service. Capella Restaurant aims to analyze the sentiment of customers' comments, flag critical issues and provide benchmarks against key competitors and can support restaurants ranging from fast-food to sit-down.

Capella Restaurant features mobile-optimized surveys; hot alerts to quickly respond and address customer complaints; the ability to set goals and benchmark against competitors; and an action-planning tool for front-line managers.

When customers leave brief or vague feedback about their dining experience, Capella's SmartProbe technology follows up with an appropriate question and encourages the customer to share more details. Its dashboard compiles the analyzed feedback and shows trends over time.
www.maritzresearch.com

••• Briefly

■ New York research company Millward Brown's digital unit Dynamic Logic has released AdIndex for Mobile, a tagging technology for identifying advertising exposure within the entire mobile ecosystem. The solution focuses on mobile insights previously unquantifiable, such as the branding efficacy of message frequency.
www.dynamiclogic.com

■ Civicom Marketing Research Services, Greenwich, Conn., has launched CiviSelect, a global respondent recruiting service. CiviSelect can recruit from social networking sites and provides discussion-guide analysis and a report that shows the eligibility of each potential respondent.
www.civi.com

■ ShopBust, a Singapore online shopper feedback platform, has debuted a new reporting dashboard for Mobile Mystery Shopping, its online mystery shopping program.
www.shopbust.com

■ Red Dot Square, an Oshkosh, Wis., research company, has partnered with Lisle, Ill., database provider Gladson to create a library of 3-D models for consumer packaged goods (CPG) products. The content library aims to allow the CPG industry to use virtual reality technology to plan merchandising and shopper marketing programs and to conduct market research.
www.reddotsquare.com

■ Jupiter, Fla., research company 3Q Global has launched The Buzz Online Focus Groups, a moderator-led discussion tool that uses an interactive whiteboard technology to display images and video and allow users to rate these by polling and various drawing tools.
www.3q-global.com

■ MD Mindset, a Whitehouse Station, N.J., research firm, and PSKW, a biopharma loyalty relationship marketing company, have partnered to use PSKW's copay assistance program data records and MD Mindset's network of health care professionals to understand why a physician engages in a copay assistance program for a specific patient. www.mdmindset.com

■ Schlesinger Interactive, a division of Iselin, N.J., research company Schlesinger Associates, has launched its online communities services to provide recruitment, project management and technology platform services for domestic and international communities. www.schlesingerassociates.com

■ New York researcher The Nielsen Company has expanded its online advertising measurement solution to Australia, Canada, Germany and Italy. Nielsen Online Campaign Ratings is designed to measure the audience of online advertising, providing reach, frequency and gross rating point metrics, as well as demographics. www.nielsen.com

■ ThinkNow Research, Burbank, Calif., has released the findings from U.S. Hispanic Cultural Values in 2013, a study that examines how U.S. Hispanics rank commonly-held cultural values, such as family unity and equality of the sexes. www.thinknowresearch.com/hispanic-cultural-values-study-2013

■ Port Washington, N.Y., research company The NPD Group has launched SupplyTrack, a monthly sales tracking service for the food service industry. www.npd.com

■ Chicago research company SymphonyIRI Group Inc. has rebranded as IRI and is online at www.iriworldwide.com.

Additionally, IRI and Cupertino, Calif., data management company BlueKai have collaborated to develop a direct-to-consumer digital platform that combines BlueKai's data platform with IRI's segmentation and predictive modeling solution.

■ New York research company GfK has announced plans to increase the size of its KnowledgePanel by one-third in 2013. KnowledgePanel is an online panel based on a representative sample of the U.S. population. www.gfk.com

■ Ipsos Healthcare, a New York research company, has launched a tumor-specific oncology monitor focusing on non-small cell lung cancer (NSCLC) in Canada. The Canadian NSCLC Monitor is the first in a series of syndicated, cancer-specific monitors to be launched in Canada. www.ipsos.com

■ Voxco, a Montreal research company, has renamed Acuity4 Social, its social media analytics solution, Semeon Analytics. www.semeon.com

■ Santa Monica, Calif., research company Dub has rebranded and launched a new Web site at www.dubishere.com.

■ ICM Research, London, has launched Rapid Response, a polling offering designed to deliver same-day results on consumer opinion regarding breaking national news stories. www.icmresearch.com

■ IW-Research and Diedrich Marketing Group, Burnsville, Minn., have rebranded as Diedrich RPM. The company is online at www.diedrichrpm.com.

■ The CASRO Institute for Research Quality, Port Jefferson, N.Y., has awarded certification to ORC International, a Princeton, N.J., research company, for compliance to the ISO 20252 standard for market, opinion and social research. Processes outlined in ISO 20252 are designed to produce transparent, consistent, well-documented and error-free methods of conducting and managing research projects. The scope of certification covers ORC International's services for Princeton, N.J.; Boston; Chicago; Maumee, Ohio; Minneapolis; New York; Reno, Nev.; and Seattle. www.casro.org

Using smart analytics to recharge your tracking studies

| By Marco Vriens
and Pat Kidd

snapshot

Tips for getting tracking studies back on track when results don't make sense or the findings stop making an impact.

While tracking studies are great they can also be plagued by unexplainable movements of the metrics and/or a dearth of actionable insights generated. The result can be an erosion of credibility and acceptance by management and a lack of compelling action items, even if the results are seen as credible. Before changing vendors or stopping the funding of the tracking work, we recommend examining whether the situation can be improved. It often can, as we will explore in this article, if you use smart analytics to obtain more credible and more actionable insights from your tracking studies.

Erratic results

Counterintuitive or seemingly erratic results can erode confidence in the tracking results as a whole and decrease the likelihood that stakeholders will use the study findings.

When presented with this type of result, the first step is to be certain that confidence intervals have been calculated correctly across waves. This may seem obvious but we have seen many cases where this was not done properly. Tracking studies using a sample that requires weighting prior to reporting the results need to use a special formula to calculate the confidence intervals. Weighting often significantly increases the confidence intervals – it's not uncommon to see an increase of 50 percent or more. What seems to be an erratic movement of a metric can actually be perfectly within the bounds of the confidence intervals once the impact of weighting is taken into account.

A second remedy is ensuring that response-style effects are mitigated as much as possible. Obvious ones, such as the straightliners, can be easily identified and dealt with. Other response-style biases are harder to detect. Respondents can vary substantially in how they respond to typical discrete response scales (e.g., five-, seven- or nine-point rating scales). Some may tend to use the middle of the scale while others may prefer to be at the extremes. Such effects can occur any time but are probably worse in cross-cultural, cross-country research. This heterogeneous scale usage compromises any comparisons across countries, segments or waves. It also causes an upward bias in the covariances among various metrics (e.g., brand ratings) which, like dominoes falling, goes on to compromise driver (regression) models.

A common approach, centering of the data, is not a fix. A better fix is to apply an approach published in the *Journal of the American Statistical Association*[1]. This approach can be relatively easily programmed in R (a popular statistical analysis language that allows market researchers to quickly program specific statistical solutions that may not be available in mainstream packages such as SPSS or SAS). Apply this as a best practice data preparation step. This needs to be done prior to any driver analysis or clustering/segmentation as such analyses will be affected by a biased covariance matrix.

Halo responders, whose emotions about the brand or topic being explored spill over into all of their metrics, are more difficult to identify and correct for. However, it's important to find them in a sample because their responses do not provide much information about individual brand attributes but are instead more a measure of how they feel overall about the brand. Halo response styles also result in multicollinearity, which makes it more difficult to determine drivers of key brand metrics. Recently models have

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been developed that separate the haloers from the non-haloers and as such can better identify the areas where the client performs well and where they perform less well.

Boost action potential

Dealing with haloers will increase the likelihood that the tracking results will identify areas for improvement. However to really boost action potential you need to do two things:

- Make the case for causality (i.e., what is truly driving the primary variable of interest, be it overall satisfaction or brand preference) and use advanced analytics to identify the most likely drivers.
- Pinpoint competitive users most likely to switch to your brand.

Imagine you're the marketing v.p. who's just received tracking results that again show a decrease in the quarterly customer satisfaction scores when you've promised a 5 percent increase. Your market research team shows you a standard regression that shows 10 significant attributes. However, you feel ambiguous about this analysis because the effect sizes seem very small and the 10 attribute drivers are quite strongly intercorrelated, which raises the question if some brand metrics are impacting other brand metrics.

You should be worried. First, standard regression will not give a valid read on what the most likely drivers of satisfaction are and as a result cannot inform the decision maker on improvement priorities. It is known that multicollinearity (i.e., highly intercorrelated potential drivers such as the satisfaction attributes) results in a high number of marginally significant but small (uninteresting) effects. More importantly, one cannot interpret these individual regression coefficients, which leads to suboptimal investments and missed opportunities.

This can be one of the reasons why executives are reluctant to act on driver models (see "The cure for infophobia" in the March 2013 issue of *Quirk's*). From a consumer or respondent behavior point of view there are two dynamics we need to account for.

One, respondents who provide haloed responses should not be used in the driver (regression) modeling because they violate what we are trying to achieve in our analysis: identifying the most likely drivers of satisfaction. For these haloers we know that their overall satisfaction causes their responses on the individual brand attributes, not the other way around.

Two, some brand metrics may have an impact on some other metrics, not just the end overall metric (e.g., overall satisfaction). For example, if you improve product quality it could be that the ratings of "quality of technical support" go up too, simply because the customer issues become less severe. So improving product quality may have a direct effect on overall satisfaction but it can also have an indirect effect because it improves the quality of technical support perception.

Dealing with halo response styles and estimating indirect effects will yield more interesting (bigger) effects and more differentiated results, making it easier to prioritize, and the identified drivers are more likely to be truly causing satisfaction. Doing this is possible but it's not straightforward. Two recently-published papers[2,3] have the ingredients for this modeling strategy: one discusses how to deal with halo respondents and the other discusses how to estimate indirect effects. We applied this combined modeling approach on several datasets and we found exactly what statistical theory says we should find: fewer statistically-significant drivers but with a higher average effect size and more differentiation and a stronger case for causality.

Imagine you are the marketing director of a global credit card brand and in your annual commitment you pledged to acquire 5 percent net new customers. You have a survey in which a sample of prospects has rated your brand along with a number of competing credit card brands on a set of brand attributes, including, say, an overall brand favorability rating. The decision you need to make is, who should be mailed credit card offers and what marketing message should be used that would lead to the highest conversion rate? You could just mail to only those respondents who already give top two-box overall favorability ratings. The problem is, there aren't too many of those and even if all of them respond (i.e., acquire the credit card) it won't get you to your goal. So, you need a smarter approach: the switchable consumer approach.

In this approach we first run a logit regression model that helps us predict what brand perceptions are most predictive of whether a person is a top two-box overall favorability person or not. Once we have this model that is estimated at the sample level, we can use it to calculate individual probabilities for being in the top two box, versus the middle box, versus the bottom box. There is usually quite some differentiation between the respondents who rated the brand somewhere in the middle of the overall favorability scale (say, they gave it an 8, 7, 6 or 5 on a 10-point rating scale). Some will show a higher than 50 percent likelihood to be in the top two box; others have a (much) lower than 50 percent likelihood of being in the top two box. A respondent with a more than 50 percent probability to be in the top two box, but an actual rating in the middle, is called the switchable consumer. Yes, currently the brand is rated in the middle box but on the other scores, especially on the drivers of overall favorability, this respondent's scores are very similar to a respondent who rates the brand top two-box.

This means that these prospective customers are really on the fence: Make your brand slightly more appealing (e.g., by exposing them to the right message) and they become likely top two-box raters and as a result now become highly likely to respond to your marketing efforts. This approach has been tested and validated. ABB Electric made more than $100 million using switchable consumer insights[4,5] and we have successfully applied the approach in our commercial work.

Squeeze value

So, if your tracking study seems to be getting stale, turn to advanced analytics to squeeze value of the data and in the process save yourself the trouble of onboarding or transitioning the study or giving up on it altogether.

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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. Pat Kidd is client services senior vice president at The Modellers. Based in the firm's Princeton, N.J., office, she can be reached at 801-290-3832 or at pat.kidd@themodellers.com.

case study

••• online research

All in the family

GSN finds strength in numbers for two popular shows

| By Laura Livers

snapshot

Findings from online research helped convince GSN that pairing two of its family-oriented shows could benefit both programs.

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Every month, more than 25 million subscribers tune in to GSN (formerly Game Show Network) for original and classic game programming. A leader in multimedia entertainment, GSN offers cross-platform content via television shows, free online games and its WorldWinner competitive cash tournaments throughout the United States, the Caribbean and Canada.

As GSN continues to expand its repertoire of shows and games, it conducts market analyses on new programs. When the network first developed the concept for *The American Bible Challenge*, a Bible-themed game show, GSN ran three in-facility research studies to determine the show's potential audience. Using a full-spectrum sample of the Christian television-viewing public, GSN wanted to explore the demographics and the interests of *The American Bible Challenge* audience, with a focus on the aspects of the show they appreciated most.

The network's greatest takeaway from its research was that viewers were, more than anything else, responding to the family-oriented nature of the show. Soon after, GSN began working on the launch of *Family Trade*, a reality show that explores the unique bartering business of a family-owned Vermont car dealership. Because the two programs share a strong focus on families, GSN wanted to examine whether its new show would appeal to the sensibilities of the established hit's audience. "What we were trying to find out was: Would these shows complement each other and how well? Did it make sense to launch them back-to-back? Did it make sense to launch one and then the other after it? We were trying to find a strategy on scheduling," says Michael Michell, vice president, research, at GSN.

'Get a false read'

Not only did GSN want to know more about the audience crossover between its two shows, but as a national network, it also wanted to hear from a sample that was representative of the United States as a whole. "Sometimes when you focus too specifically on a city or state, you can get a false read," Michell says. "The national sample base gives me the ability to make sure we don't have a program that is more regionally-focused."

To reach these goals, GSN and its research partner, Philadelphia-based Focus Pointe Global (FPG), decided to enhance the network's typical facility-based pilot testing by conducting additional research online using FPG's qualitative panel.

Though it's still an evolving methodology, online research can have strategic advantages over more traditional studies and those advantages have led to a shift in the nature of marketing research. Online research can be far quicker and more cost-effective and it allows researchers to gain access to a national audience all at once rather than forcing them to conduct studies in one city at a time. Since panelists in today's world are almost constantly connected to the Internet via smartphone, tablet or computer, online studies make it possible to meet panelists wherever they are – making it easier to recruit willing, authentic participants who fit study criteria.

Panels like the one used in this study are built through qualitative recruiting – that is, inviting people to join, typically via a Web site, online advertisement, social media outreach, phone call or flyer. Prospective panelists complete full demographic profiles, giving the panel provider and researchers deep insights into their habits before they ever participate in a study. Panelists can be drawn from this pool for both qualitative and quantitative research studies. With a large group of panelists and a wealth of preexisting information to draw on, researchers can utilize high-quality panels that provide accurate, detailed results.

Just the right audience

For GSN's study, study invitations were specifically targeted based on panelist-defined demographic criteria, allowing researchers to home in on just the right audience for their products and services – in this case, Christian game-show viewers.

These panelists provided a variety of additional benefits to this particular research: Having already participated in qualitative studies, they were used to committing significant time to face-to-face focus groups so they didn't experience research fatigue as quickly and were more willing to commit their attention to longer-form online studies. Their prior experience also helped them have a better idea of the level of informative detail that researchers crave in their responses. Finally, with this approach, the researcher gains access to "exhaust data" or information entered by the panelist during the prequalification screener, allowing for an array of demographic sorting options.

This qualitative online research methodology made it possible for GSN and Focus Pointe to revisit panelists who were screened for and participated in the original study for *The American Bible Challenge*, rather than starting from scratch. "When we did the initial research, we didn't know that there would be a second part," says

Ileen Branderbit, executive vice president of Focus Pointe Global. "But because those individuals became panelists, we were able to go back to them and further delve into how they felt about both shows."

Prior to the start of the study, a prequalification screener that gauged television viewing habits was e-mailed to each panelist who took the original screener for *The American Bible Challenge*. After choosing a qualified group of panelists, Focus Pointe e-mailed them an online survey that consisted of an embedded version of the *Family Trade* pilot, followed by post-viewing questions. Because watching the pilot was a crucial part of the online survey, GSN used a methodology that wouldn't allow panelists to fast-forward through the video.

Gained valuable information

The project engaged more than 1,000 panelists and was completed, from start to finish, in just one week during the busiest season of the year – the fourth quarter. GSN gained valuable information from the study that has contributed to formulating the network's strategy. "We found that there definitely was a crossover for these two audiences. *The American Bible Challenge* audience appreciated the family aspect of *Family Trade*," Michell says.

"We liked the crossover, so we decided to launch *Family Trade* first and then *The American Bible Challenge* would come in with about three weeks of *Family Trade* left so that we could cross-promote between the two."

After the study was complete, GSN and Focus Pointe worked together to create crosstabulations using the data collected. This robust collection of interrelated data points allowed GSN to conduct its own detailed analysis of the results. "We used enough of a sample that I was able to do a lot of deeper dives so I could look further into a specific demographic and psychographic data to get a better understanding about that individual or type," Michell says. "The advantage you get by going online is scale. With that scale,

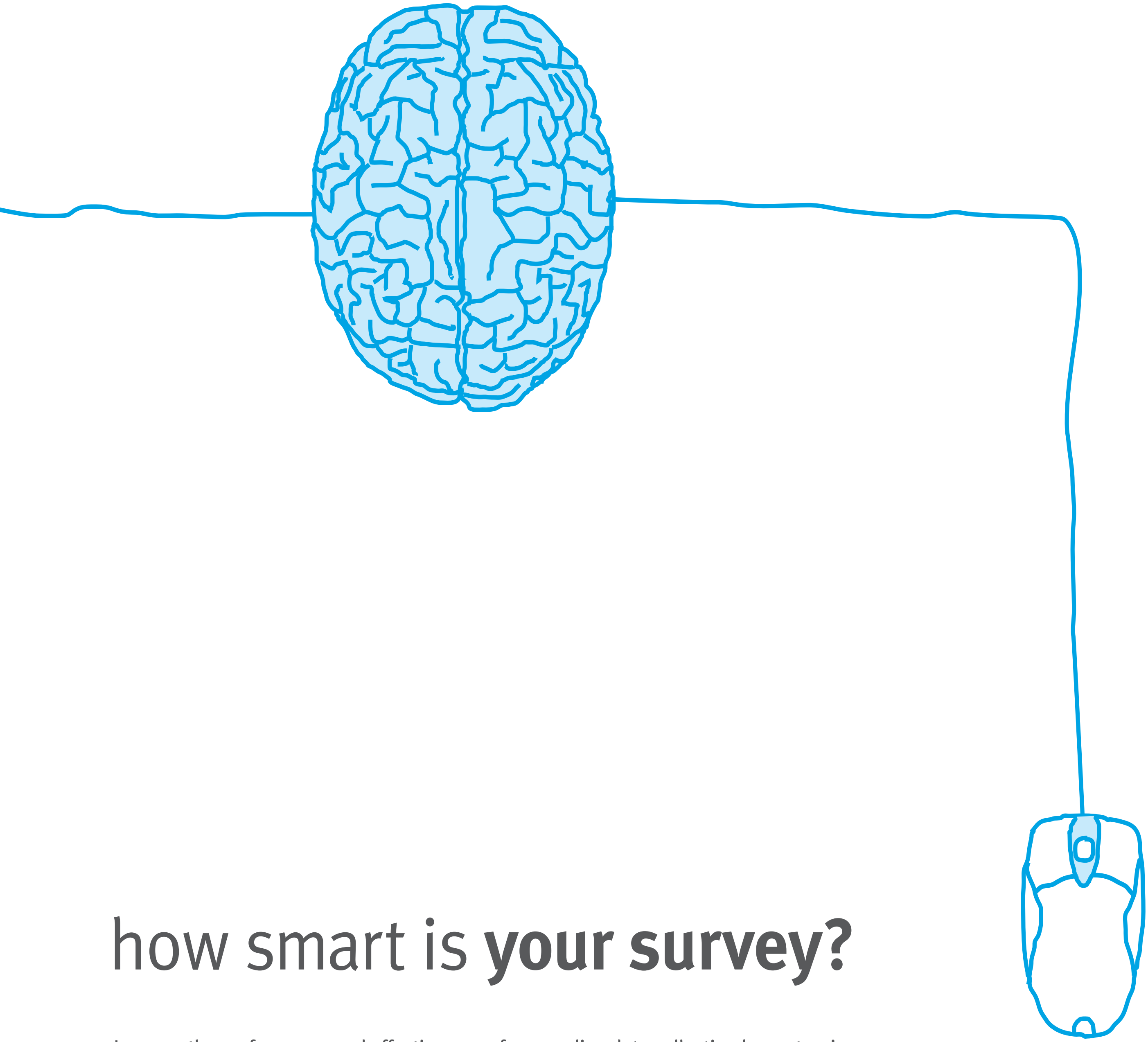
it allows me to dissect the numbers more finely."

Remain open

As online research becomes more prevalent, it's important that researchers remain open to experimenting with new options made available through technology. Though GSN traditionally conducts in-facility research, this online study gave the network an opportunity to try mixed-mode research and the new avenue has proven fruitful. "I like the qualitative and quantitative nature of this type of research," Michell says. "I like to use as many tools as I can, because my goal is to always have success with every program."

Indeed, GSN's new shows have met with great success – the second season of *The American Bible Challenge*, the highest-rated original series in the network's history, premiered March 21, nine days after the series premier of *Family Trade* – labeled a "game-changer" by the *Los Angeles Times* – which premiered with above-average ratings March 12 in the prime 8 p.m. time slot. "The [qualitative] research beforehand gives you an advantage. I'll use the analogy of a baseball player: The more they practice, the better they get," Michell says. "The more we educate ourselves about our programs, viewers and the things we're trying to do, the better chance of success we have with our programs."

Laura Livers is president of Philadelphia research firm Focus Pointe Global. She can be reached at 678-298-9230 or at llivers@focuspointeglobal.com.



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••• big data

Taking the good with the bad

Big data: boon to improving customer experience, bane of researchers?

| By John Goodman, Peter North and David Beinhacker

snapshot

The authors explore examples of the use of big data to improve the customer experience and offer tips for researchers to avoid being left in big data's wake.

While big data (BD) is a hot topic in the realms of marketing segmentation, marketing research and customer experience, your view of it likely depends on your vantage point. For those in segmentation and customer experience, big data offers many exciting and varied ways to listen to, learn about and analyze your customers and non-customers alike. For those in marketing research, however, big data looms as a threat that could put you out of business, as technology vendors have created data-driven utilities that ostensibly replace much of the satisfaction-tracking functions traditionally performed by market research companies.

Big data is most often used for marketing purposes but it has powerful customer experience applications that are often overlooked and underutilized. This article first suggests a broad definition of BD. It then suggests incorporating a broader range of data inputs into BD than most companies use. These expanded inputs, in turn, lead to

valuable opportunities for improving the customer experience process. The article then suggests the biggest opportunities and threats created by the broader definition and range of inputs. Finally, it addresses how to best play the politics of big data and recommends specific actions you can take to assure you are driving the BD bus as opposed to being run over by it.

New forms

In 2012, Gartner updated its definition of big data to "high volume, high velocity and/or high variety information assets that require new forms of processing to enable enhanced decision-making, insight discovery and process optimization." While there are dozens of definitions, Gartner's is adequate because it highlights the complexity stemming from many sources and new forms of processing to make decisions and discover insights.

The term "many sources" means that in the customer experience context, this data can be produced by any electronic source but it also exists on pads of paper in call centers and within stories related in focus groups. So, in the customer experience context, any information or data describing an instance or aspect of a customer experience is a possible part of the customer experience BD constellation. The challenge is recognizing the source and translating it into a compatible format and classification. The new approach to processing implies sorting through the mass of data to find the nuggets that are important. Making decisions and discovering insights requires more than data-crunching; actionable outcomes arrive from what Shah, Horne and Capella call "informed skeptics" who apply informed judgment to analysis.[1]

Customer experience BD consists of the usual suspects – contact data, customer survey data, employee survey data, purchase data, customer demographics and economic data (usually purchased from aggregators). In addition, there are now many "squishier" data sources such as digital recordings, social media and videos, as well as ad hoc employee input. Finally, there is a massive amount of transaction and quality data, such as process failure data (e.g., the part was not in stock or the package was not delivered on time), that, in our experience, is not even viewed as customer experience data. However, it is often some of the richest in terms of describing the key facets of the customer experience.

In the past, the squishy data was only sampled by quality analysts or researchers because it was too massive. Similarly, the transaction and quality data was only reported in aggregate and in most cases was downplayed. For example, to say that 95 percent of all appointments were met sounds impressive until you know that there were 3,000 appointments in a day so 150 customers waited at home in vain each day. If you then could tie those missed appointments to call data, survey data and repurchase data, you could start calculating how much revenue and word-of-mouth damage occurred in addition to the extra cost of rescheduling or expediting visits.

A number of opportunities

Big data can be used in a number of ways and presents a number of opportunities for the customer experience – almost all involving making business more proactive. It is traditionally used to segment customers for marketing offerings, such as how Amazon uses it, suggesting cross-sell and up-sell. The new innovation is proactively setting and resetting expectations. In a November 2012 survey of more than 600 companies, conducted as part of World Quality Month, the American Society for Quality found that the single biggest concern of businesses was setting proper customer expectations[2].

The survey polled more than 600 quality and customer service experts worldwide, who said that managing customer expectations (29 percent) and communicating with customers (20 percent) are the top challenges in maintaining quality service.

Other challenges include: educating customers about products and services (16 percent); providing customers with timely service (13 percent); and training and retaining good staff (12 percent). What is fascinating with all five of these items is that they all can be at least partially remedied by big data.

Given that no one reads contracts or directions anymore (we find that less than 2 percent of any audience


InterVu Webcam Focus Groups are
Ideal for Hard to Reach Respondents
Ideal for
Testing Visual Aids
Evaluating Messages
Testing Creative Concepts
Understanding Segments

says they fully read their homeowners insurance policy, for example), expectations-setting must be achieved via highly tailored and "just-in-time" communication. One insurance company tailors the welcome letter to customers to highlight only the three provisions that have proved to be the most likely to create unpleasant surprises for that specific type of customer. Likewise, a utility uses integrated data to communicate via each customer's preferred communication channel (text, e-mail or cell phone) to update power outage information by individual neighborhood. Market research should be working to identify these information needs (including exactly when they will be needed) and provide this information to the operations side of the business – that is, steering the big data bus.

The second and third issues (communication and education) have huge opportunities for enhancement via big data. Customers can be contacted through their preferred communication channel about the most relevant information, which will get their attention. Both of these issues were combined in a recent test at a West Coast power utility. We found that sending an e-mail saying, in effect "Your bill is going to be an unpleasant surprise and we're concerned!" got a 54 percent open rate across more than 30,000 customers – an extremely high open rate (most industry e-mail campaigns have open rates of no more than 10 percent). Once opened, the e-mail offered energy usage data for the first 10 days of the billing period and projections showing that the ultimate bill would be $50 or 30 percent higher than expected. It then offered three energy-saving tips and links to sign up for more support tools. Click-through rates and adoption of the offered tools were very high and a number of consumers called with compliments, saying it shows the utility really cares about helping consumers conserve and keep their bill down. Getting such a positive response from customers from such negative news is a testament to the vast potential of customer communication and education.

Providing timely service via data is what one of the authors (Goodman) calls delivering "psychic pizza." That is, ringing the doorbell and saying, "Here is the pizza you were about to order!" This process preemptively addresses predictable needs or service questions that customers haven't even asked yet. For example, an East Coast utility has addressed the perennial point of pain of arranging a home repair visit by getting the consumer's preferred channel of communication, confirming the afternoon before in an automated manner via that preferred channel and informing the customer that the service tech will call at 8:00 a.m. to tell the consumer where they stand in the daily queue. This delights the customer and eliminates the cost of up to three inbound phone calls: 4 p.m. the day before ("Is he really coming tomorrow?"); 8 a.m. the day of the visit ("When is he coming?"); and the frantic call if he is not there by 10:30 a.m. ("Is he really coming before noon because I have to go back to the office!").

Retaining good staff

Big data can also assist in retaining and training good service staff by both preventing frustratingly recurring customer "dumb questions and inquiries" (which are reduced by voice-of the customer and customer education activities) and by providing easily accessible, flexible answers to front-line employees so that they can be more successful in handling difficult issues. One financial services company provides service staff with flexible solution spaces and talking points based on customer history and value and the specific circumstances – there can be four answers to the same problem based on the big data algorithm.

Half of all voluntary turnover among good employees is due to the employee being frustrated by their own lack of effective tools and answers. They often say, "I'm not getting paid enough to take flack for things that are not my fault and that I can't explain." Big data can provide them with clear, believable, defensible explanations that leave the customer feeling that they were treated fairly.

Market research should be identifying where education is needed and evaluating the effectiveness of customer education as well as the effectiveness of response guidance in producing customers who are satisfied and feel that they have been treated fairly and with respect.

Serious threats

But for all of its beneficial applications, big data also presents some serious potential threats to the quality of the customer experience and to the job security of market research professionals and vendors.

The threat to the customer experience is using the data in a way that offends or scares customers. One hotel chain found that too much personalization offended customers. A customer noted "The fact that I ordered scotch on one trip does NOT mean I want extra scotch stocked in my mini-bar – in fact I'm not sure that I even want what and how much I drink in your records!" The point is to be responsive without being creepy. To avoid making a mess of the experience you cannot take the data and mechanistically act on it. As Shah et al. say in their *Harvard Business Review* article, leaven data with judgment and avoid formulaic, one-size-fits-all actions.

The threats to researchers' job security are much more serious and certain. First, most CRM systems execute automatic e-mail satisfaction tracking campaigns, which is fast becoming the response medium of choice. This eliminates the need for outside survey firms to conduct satisfaction tracking surveys. Additionally, the CRM systems can automatically integrate the survey data back into the customer records for use in both analysis and future interactions with the customer. Likewise, most telephone automated call directors are equipped with computer telephone integration (CTI), which facilitates measurement of first-contact resolution by allowing easy identification of repeat calls from the same phone number – again, no need to ask the same introductory questions of a customer who has already provided the answers.

A second threat is that CRM, when tied to operational data, can also report customer experience more complexly and accurately than the customer themselves can on a survey. For example, a delivery company has operational data indicating exactly how many packages missed their connection and therefore were not delivered on time. The company also has call center data describing the incidents where the customer called in to complain. Finally, it has satisfaction survey data collected after the fact. The CRM data, with the operational data included, will provide a more complete record of the total number of customers encountering any particular problem and, after the fact, allow analysis of the impact of the incident on loyalty and actual sales – which is often more credible than customer-stated intention to repurchase. Again, this suggests a possible decline in the need for surveys.

The third threat lies in the contact center and is embodied in the speech analytics tools now being brought online. These tools, when properly tuned, can ascertain satisfaction, replacing both call-quality monitoring and satisfaction surveying. While this is troubling for survey companies and the market research department, it is disastrous for the quality-monitoring staff, because we predict that within three years, their jobs will completely disappear. Finally, these same speech analytics tools can analyze phrases and sequences to identify the best ways to pitch a product to improve sales and close rates.

You are probably reacting angrily, in one of two ways. First, you say that these tools are not accurate and won't be any time soon. Three years ago you were right. Now, some of the tools are becoming very accurate. Second, you are confident that the tools will be too expensive to be adopted. Again, in the past, they were a half-million dollars and up. The prices have dropped dramatically and now compete with the costs of labor-intensive activities like call monitoring. Further, once they are purchased for one function, they will be available to perform all the other functions as well.

Now, before you start redrafting your résumé, take heart. Most of the vendors don't know how to effectively use the brilliant tools they are being offered – so you have a few years. But you should prepare to incorporate them into your toolkit.

Learn to drive it

So how can you take the wheel of the big data bus and learn to drive it rather than getting run over by it? First, some perspective. Big data has been around for almost 20 years, starting with Amazon personalizing product recommendations based on previous purchases. In the late 1990s, CRM systems promised a customer experience nirvana almost before customer experience was first introduced by Joe Pine in the mid-1990s. The ongoing challenge of BD from a customer experience perspective is to get the BD tools to truly (and cost-effectively) enhance the customer experience and to do so without seeming creepy and/or violating privacy. Most of the vendors cannot provide the savvy judgment needed to capitalize on these challenges, which provides the primary opportunity for marketing research.

For marketing research to gain a leadership position in the use of big data, researchers must:

- explore and understand all the capabilities of BD to provide and take action on business intelligence and how it can be practically used for enhancing the customer experience, like the delivery of psychic pizza to both improve loyalty and word-of-mouth as well as decrease costs;
- understand at least topline approaches to the technical integration of the various tools like CRM, CTI and speech analytics;
- provide the cross-functional bridge between marketing, operations and finance, exerting the necessary political finesse to keep everyone focused on the goal of enhancing the customer experience;
- evaluate how effective the implementations are in really impacting customer experience; and
- create the capability to analyze how the tools impact costs and revenue in a transparent manner, one that the CFO and CMO will accept.

Capitalizing on big data will require hard work and political savvy and there is a good chance you will end up with a smaller staff. But the work you do will have more impact and the jobs that remain will be more sophisticated. And, as you gain experience working with and synthesizing all of the disparate data sources available to you, you'll enhance your own skill set in ways that will position you for whatever comes next.

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John Goodman is vice chairman of Customer Care Measurement and Consulting, Alexandria, Va. He can be reached at 703-823-9540 or at jgoodman@customercaremc.com. Based in Chevy Chase, Md., Peter North is principal of True North Digital, a digital marketing consulting firm. He can be reached at peter.william.north@gmail.com. David Beinhacker is director of research at Customer Care Measurement and Consulting. He can be reached at david@customercaremc.com.


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MULTIMODAL DATA COLLECTION CAPABILITIES: IN-PERSON, INTERNET, MAIL, MOBILE, TELEPHONE brand research

What's the word on the street?

Using consumer engagement marketing for insights-gathering

| By Kyle Langley

snapshot

The author makes a case for the value of augmenting traditional research with data and observations gathered by on-site teams of brand ambassadors.

Marketing research has always been a trade-off between what you need to know and how much budget you have to achieve it. Additionally, with budget limitations, what is the level of comfort when it comes to confidence interval, number of interviews, number of focus groups, online quality, etc.? The key is balancing different types of research across those budgets to get the most useful data. With that in mind, what if you could operationalize and leverage economies of scale with other marketing strategies (and budgets) that you already have to gather quality insights? Not only is it possible but the insights come on-the-spot while the consumer respondents are using your products or a competitor's products in real time.

Imagine you are a CPG product in beverages or spirits. A natural marketing strategy for many of these companies is doing consumer engagements (CE) at bars or locations where sampling and promotions happen regularly. Imagine that your field marketing agency uses highly trained brand ambassadors (not temporary spokesmodels or nice people simply handing out samples) who on a nightly or weekly basis have contact with consumers in bars and at certain retail locations. They are well-versed in all aspects of the brand and actually live the lifestyle of the brand so the consumer engagement is genuine and real and not just some sales pitch. It is not only about the brand and product but building relationships around the brand and product.

With your CE field marketing covered, think again about the additional possibilities. With potentially hundreds of thousands of conversations (depending on program size) on the spot, over time, your brand ambassadors have learned a lot and they are also well positioned to gather insights directly. Insights in consumer engagement can be gathered by: metrics through handheld devices they are likely using anyway; anecdotal insights through what field agents/brand ambassadors observe behaviorally about consumers; anecdotal insights based on what field agents/brand ambassadors hear in conversation with consumers; what these field reps experience by being around consumers while they use the products; and what field reps ask consumers as a part of specific research needs (i.e., short surveys).

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Gather consumer data

As a matter of course, any serious consumer engagement/field marketing effort will use handheld devices to gather consumer data (as opposed to simple sampling). Handhelds are often mandatory as there are issues with accountability for age verification and coupon-offer metrics especially in spirits and tobacco engagements. It is typically more beneficial to use handhelds and many can now print out coupons on the spot. These devices can upload data automatically and that data can be accessed quickly for instant analysis. Additionally, while you never want the handheld device to intrude on the CE (it can be too time-consuming and not always conducive to relationship-building), specific questions can be added to meet insights needs. But this is not where the deeper insights will come from; handhelds only supplement by gathering demographic, contact, usage and usual brand metrics.

In discussions with consumer engagement field teams over the years it is amazing how quickly they can derive answers based on their CE experiences. Over time they know consumers and what they think about products, brands, trends in the category, which consumers are harder to reach, why brand loyalties are as they are (peer pressure, comfort) and a general sense of the competitive landscape at levels that may not always be measureable in traditional research. You have eyes and ears in many markets across venues of all types, so use them.

As a part of any consumer engagement program, training and constant communications with your field teams and managers are in order. This is done to ensure field teams are getting and using the latest information and best practices in reaching consumers in consumer engagement. Additionally, it allows an opportunity to gather insights for brand and marketing needs. By using regular reporting schedules for program metrics and best practices, plus the gathering of needed information, insights can keep flowing in and can also drive additional questions based on what you are learning.

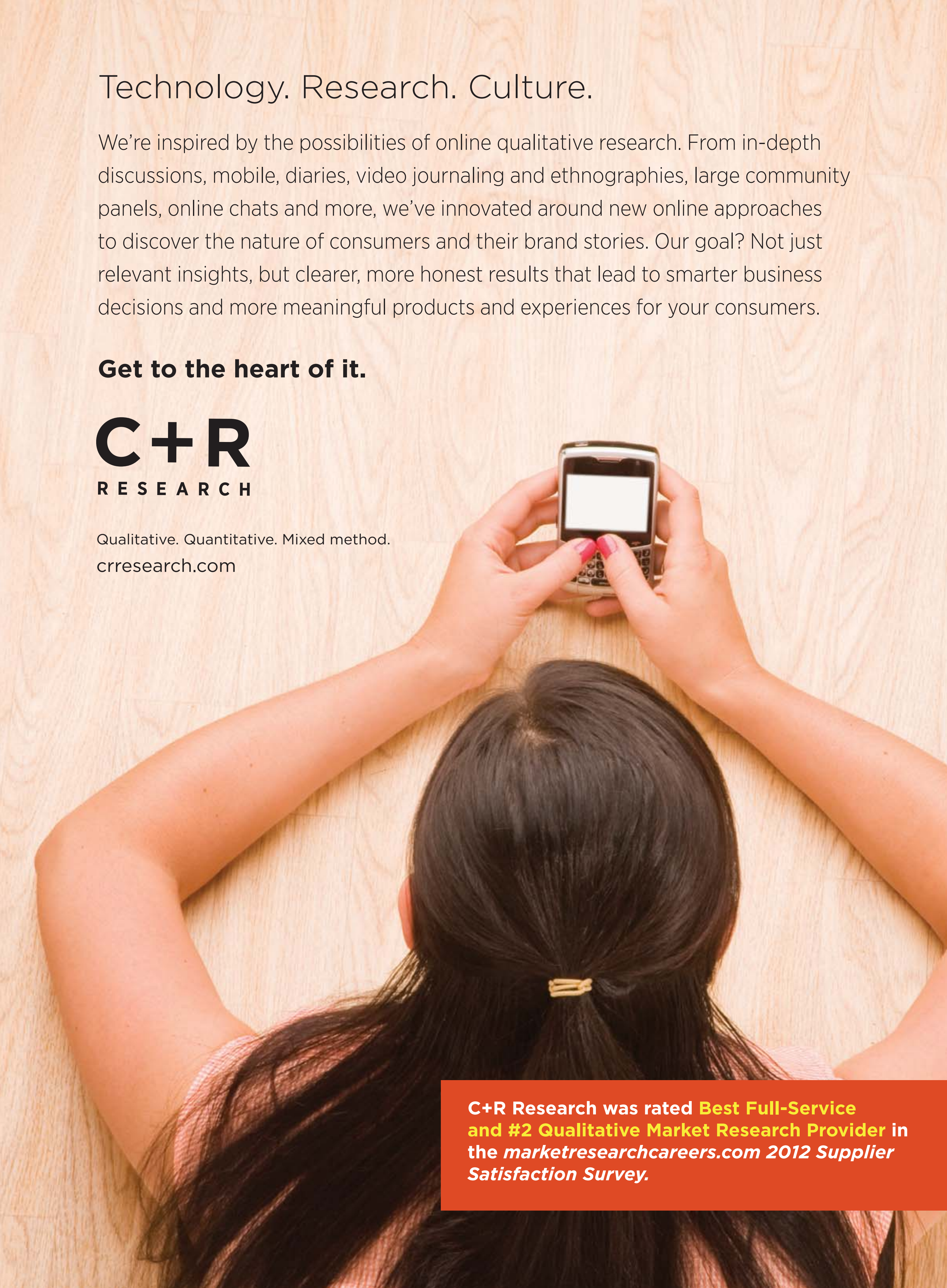
Specific insights

Field agents and brand ambassadors can also be trained and used to gather specific insights through surveys or simple CE conversations. They are taught to get at the why behind the what. They have flexibility in asking additional follow-up questions to highlight specific responses.

Well-trained field agents and brand ambassadors are given a lot of latitude in sizing up consumers and determining which dialogue to use and which approaches work best with specific consumers. So it should be with insights-gathering as well. The field personnel should not be out just to get a specific number of surveys, they should be trained to talk with consumers who are willing and who can give deeper meaning to the survey questions. This is where the relationships that field teams build with the consumers are so important. (For this reason, surveys in retail convenience stores are not usually recommended due to the hurried nature of the retail transaction.)

Again, it is important not to intrude on the consumer engagement with a long survey. It is best to limit survey questions to three or four and no more than six. These are typically executed on a one-page paper survey or through electronic tablets. Tablets are especially useful if they are also being used as a part of the consumer engagement to highlight brand messaging, drive people to the Web, etc. Since many or most consumers ages 18-35 are very technology-literate it can be a natural attraction to want to participate. Additionally, research has shown that consumers actually appreciate a brand that thinks enough of them to solicit feedback (especially franchise consumers of the brand doing the engagement).

A second way to use field agents in consumer engagements for direct insights-gathering is to send them out with a single question for consumers they talk with. It is included as a part of the consumer engagement dialogue. At the end of a night or week, you can gain consensus input from your teams on what they found. This consensus by market can then be tallied across all of your markets to get a feel for what the answers are. This execution can be done in as little as two to three days to get at fast answers.


Technology. Research. Culture.
We're inspired by the possibilities of online qualitative research. From in-depth discussions, mobile, diaries, video journaling and ethnographies, large community panels, online chats and more, we've innovated around new online approaches to discover the nature of consumers and their brand stories. Our goal? Not just relevant insights, but clearer, more honest results that lead to smarter business decisions and more meaningful products and experiences for your consumers.
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Advantage of speed

One big advantage of using CE teams to gather insights is not only the richness of the findings for other purposes but the constant refinement of best practices in reaching consumers through consumer engagement. The greatest advantage, however, may be speed. When CEOs want fast information from their brand leaders, traditional market research is often not readily able to get fast answers. With permanent markets and teams in consumer engagement and a good analysis team, answers can be gained in a couple of days with consensus input from teams on what they are seeing and hearing.

As for specific survey questions, as highlighted earlier, insights can be gathered and presented to a brand manager in as little as two weeks. Real-world examples exist of getting 500-plus in-person, on-site surveys completed across 22 markets (i.e., 25 in each market) through consumer engagement, with results turned around within two weeks.

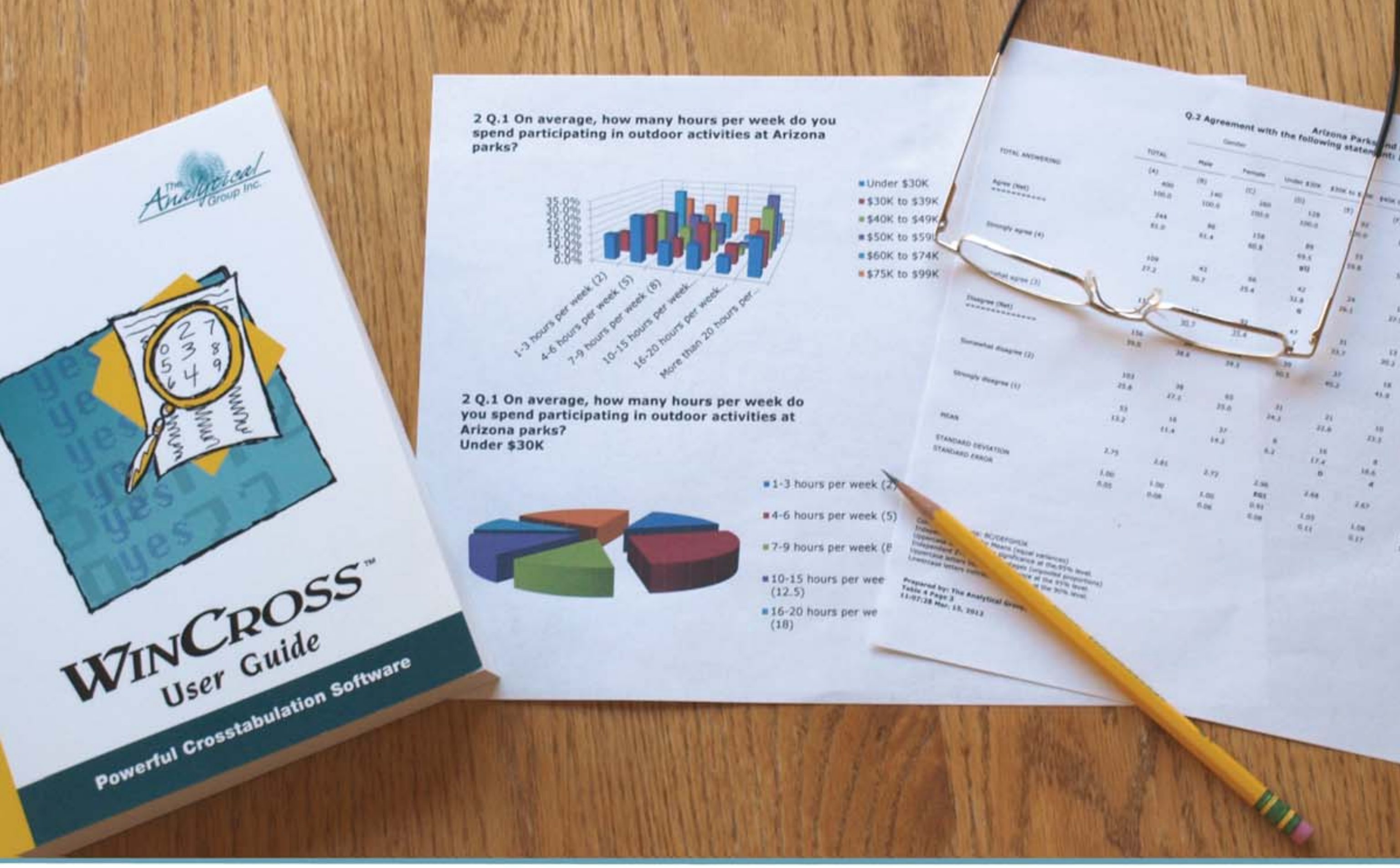
This CE strategy for gathering consumer insights is not a stand-alone research method. It should be used as a part of a complete research regimen where findings within various methods drive insight-seeking in a continuous loop. Where the CE insights-gathering methodology is especially strong is not only in supplementing other research but having the opportunity to gather almost instant feedback when needed. Traditional marketing strategy typically works off information gleaned in the last six months. Teams are working on future strategy based on data that will arrive in three months. When leaders call upon brand managers for instant answers those insights are often not quickly available. They can be when you use consumer engagement to gather them. It can also make for deeper insights at the point-of-sale with consumers who may have your product or a competitor product in their hands at the time of the engagement. The potential is also there for consumers to try a product as a part of the CE conversation where instant feedback can be obtained. Again, this method works much better for certain CPG categories such as spirits, beer, beverages, food and tobacco.

Ask yourself

So, when it comes to using your budgets and trade-offs for consumer insights and marketing research simply ask yourself these questions. Do you want to make product strategy decisions based only on quantitative data that is six months old or wait for three more months until the newest quantitative phone or panel tracker and A&U data comes in? Do you want to base in-person consumer discussions on focus groups and/or in combination with tracker or A&U data?

The choice is yours but deep insights can also be found using consumer engagement as a catalyst. You never want to leave valuable information on the table or an opportunity to leverage what you already have available to gather consumer insights and marketing research.

Kyle Langley is chief research officer at BFG Communications, Hilton Head Island, S.C. He can be reached at klangley@bfgcom.com.


The Analytical Group Inc.
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User Guide
Powerful Crosstabulation Software
2 Q.1 On average, how many hours per week do you spend participating in outdoor activities at Arizona parks?
Under $30K
$30K to $39K
$40K to $49K
$50K to $59K
$60K to $74K
$75K to $99K
2 Q.1 On average, how many hours per week do you spend participating in outdoor activities at Arizona parks?
Under $30K
1-3 hours per week (2)
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PowerPoint endures, mobile apps look secure

A report on the Confirmit Market Research Software Survey

| By Tim Macer and Sheila Wilson

snapshot

Among the highlights in this recap of the annual study of software and technology usage by research companies are ongoing struggles with survey length and a marked commitment to quality control.

Now in its ninth year, the 2012 iteration of the Confirmit Market Research Software Survey of software and technology among market research companies finds an industry not only dependent on technology but adjusting its activities around the new opportunities technology presents.

In addition to tracking major trends, the study delves into some the hottest topics each year. This year, that includes incentivized panels, interview quality measures, survey length and the impact of mobile.

For the first time, readers of *Quirk's* were also invited to join the survey, which has helped boost response this year to a record 250 participating companies in 37 countries. As before, we only include responses from IT decision-makers or decision-influencers within market research companies in the sample and include only one response from each company, as our target is companies, not individuals.

Results are presented unweighted and we advise that you consider all figures reported to be indicative in nature and thus not to be used as a basis for projections. In this article, we have picked out a few highlights from the full report, which you can download at meaning.uk.com/mrss12.

Research modes in use

Since 2006 the survey has tracked the relative volumes of research work done by mode. While the dominance of the major modes remains largely unchanged, evidence is stacking up that some of the newer research approaches are now coming more to the forefront. Overall, survey estimates for the four principal data collection modes, plus mixed-mode, are little changed from previous years – although paper is continuing on its gradual downward slide, from 21 percent of fieldwork in 2006 to just 10 percent today. Together, they account for 97 percent of the fieldwork volumes reported in the survey.

By asking the volume of work done, we can also estimate the penetration of each mode – how many firms are tooled up to offer that method.

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Table 1: Penetration and volume data for 2012

Mode	Volume	Penetration
Web	51%	92%
CATI	21%	68%
Paper	10%	51%
CAPI	9%	48%
Mixed-mode	6%	46%

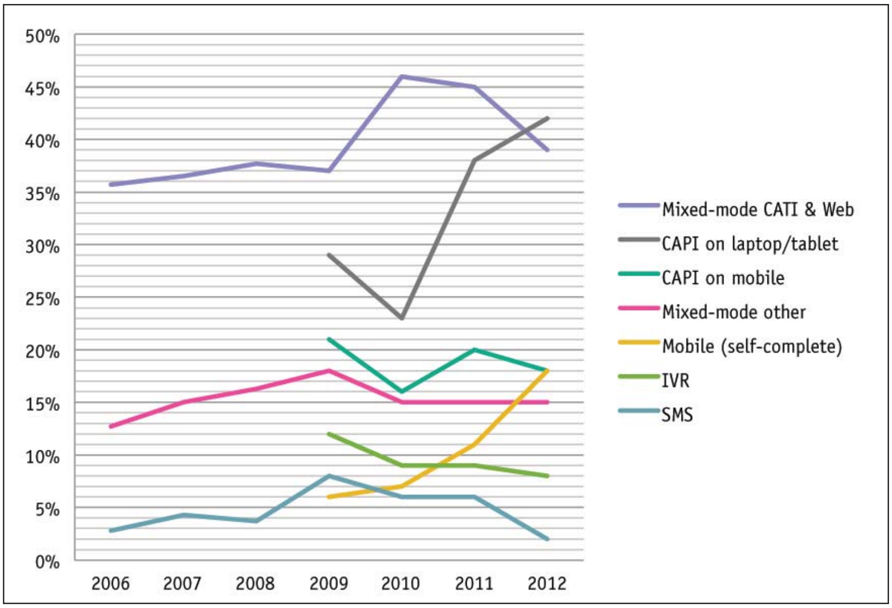

Figure 1: Penetration of Specialized Research Methods, as Offered By Research Companies
(Note: CAPI, IVR and mobile were introduced to the survey in 2009)

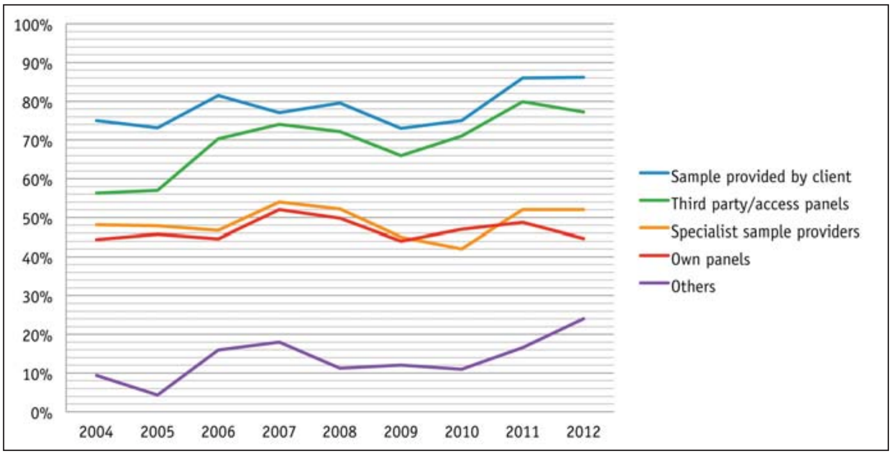

Figure 2: Online Sample Sources in Use
(N = 250)

Although the numbers are small – and therefore prone to variation – the trend for minority data collection modes shows some interesting changes. Volumes remain low. Mobile self-completion is a bare 2 percent, though this is up from previous years – until now it has hovered at or around 1 percent. But more companies are now offering these specialist data collection modes, as Figure 1 shows.

Online sample sources

We were intrigued this year to notice that the "others" response to the question "Which sources of online sample do you use?" seems to have taken an upward turn (Figure 2). Most years somewhere around 10 percent of companies said they used "other" sample sources but in 2011 it was 17 percent and in 2012 24 percent.

This prompted us to do some specific follow-up with these companies, from which we learned that researchers are being ever more resourceful in finding ways to reach survey populations. One researcher working at a large company told us that he uses old-fashioned snail mail with a survey link. Our contacts also mentioned diverse places where recruitment adverts can be placed, such as social media, magazines and Web sites related to the subject of the survey, etc.

Having said this, our "other" sample sources represent only 4 percent of the total volume of sample used. Access panels remain predominant and they are slowly taking a larger slice of the cake – in 2006, 29 percent of sample was sourced from access panels and in 2012, it is 35 percent. This increase seems to be replacing missing volume from companies' own panels, where the share has gradually fallen from 30 percent to 24 percent in the same time period.

Incentivized panel use

In the light of recent controversies over the reliability of surveys from incen-

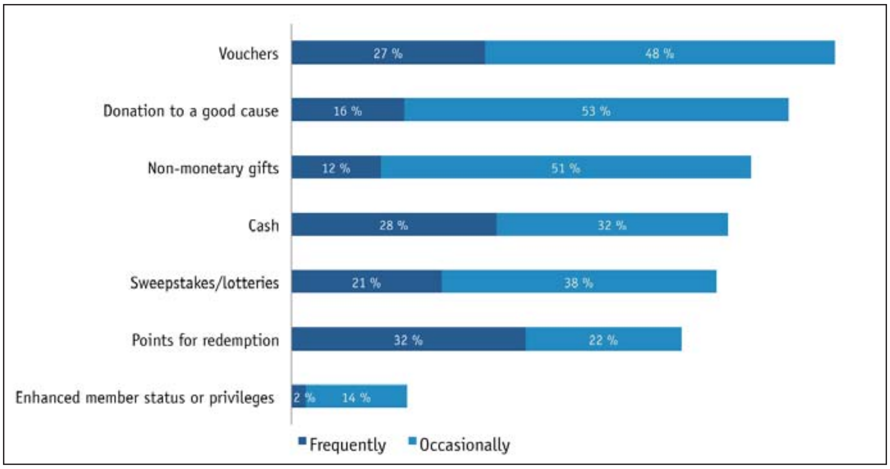

Figure 3: Incentives Used – Frequently or Occasionally
("Which of these incentives do you use and to what extent?")

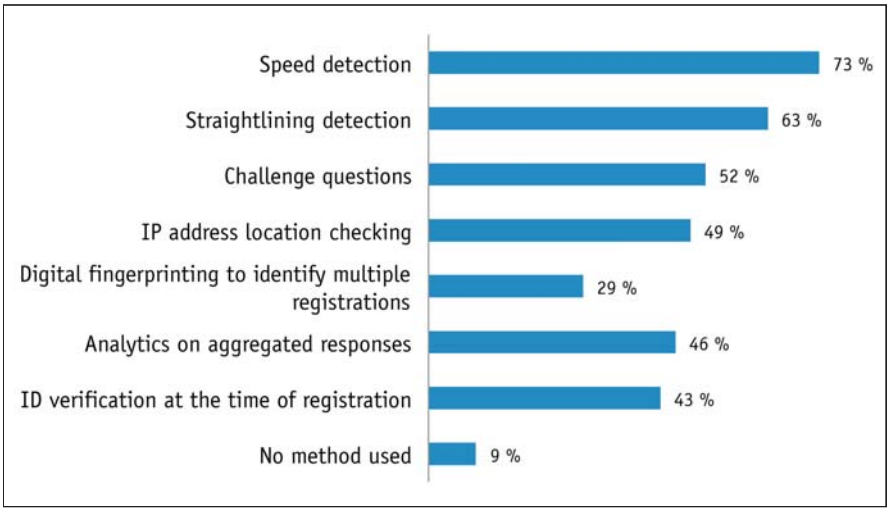

Figure 4: Technical Interventions Used by Research Companies to Detect Poor-Quality Online Survey Data

tivized panels and the investigations by industry bodies such as CASRO and ESOMAR, we focused several questions for 2012 on panels and the panel quality measures that operators use.

In one question, we established that panels with incentives account for the majority of online research – our estimate is 63 percent overall and 66 percent specifically in North America. A quarter of companies claim to use incentivized panels for all of their online research.

Near-cash incentives and vouchers are the most prevalent overall, with 75 percent of companies using them (Figure 3). The very similar method of accumulating points until a specific reward is given seems to divide opinion. Overall, it is the method most respondents said they used frequently and it is more likely to be used as a primary method than an occasional method. That is, if people put a points system in place, they tend to exploit it to the fullest.

What might be viewed as the less "contaminating" methods – donations to a good cause and awarding enhanced kudos to the member through enhanced status or privilege – are less favored, much less so in the case of reward via status or privilege. This method has most relevance in the context of MROCs, where there are others to notice your enhanced kudos. It was the only method to be in the minority, with just a handful of proponents, which probably also reflects the relative status of MROCs in the mix – which we will explore presently.

Online survey quality control measures

The aspect of incentivized panels which most concerns methodologists and industry bodies alike is their effect on survey quality. If people are lying to take surveys and scoop the reward, then it behooves the survey designer to be wary and set traps to detect them.

Curious to know the extent to which this was happening, we included a question on the quality-control mea-

Table 2: Natural limit for survey length, in minutes

	Telephone	Online	Mobile
Mean	19.91	19.85	8.34
Median	18	15	7
Std dev	12.36	12.75	5.09

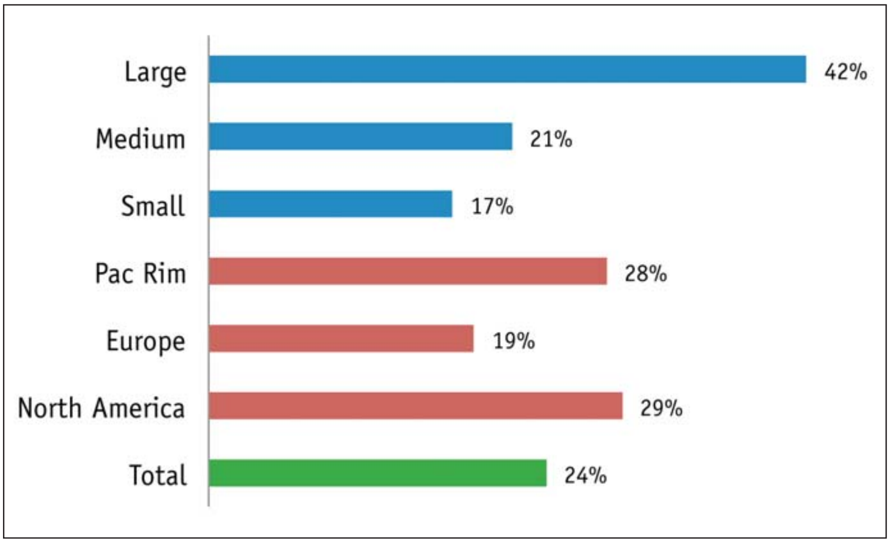

Figure 5: Adoption of Independent Panel Verification Services (Among Panel Owners)
(N = 110)

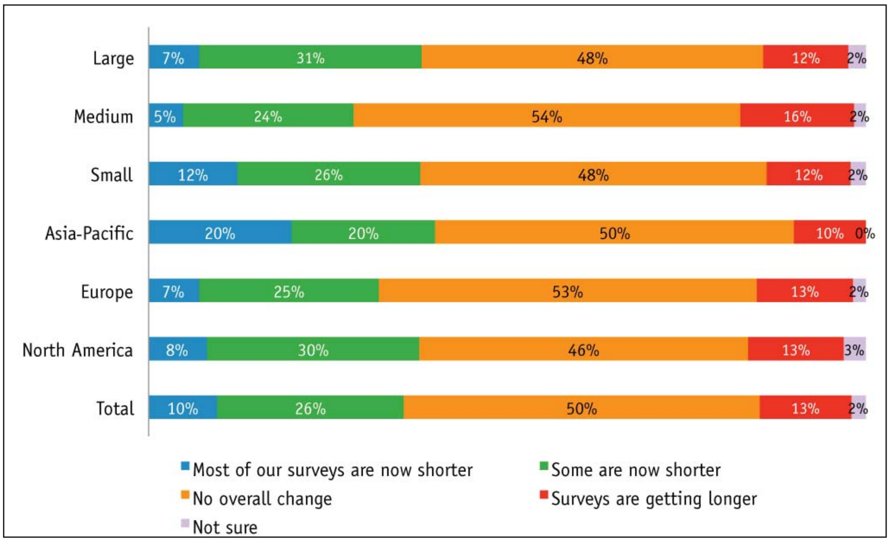

Figure 6: Changes Reported in Survey Length
("To what extent have you observed any decrease in the length of the surveys that your company administers?")

sures that firms routinely apply to their surveys. As seen in Figure 4, the results show this is an area the industry is taking seriously.

Weeding out the hyperactives

Digital fingerprinting can help to identify the more extreme professional respondents that CASRO and others are particularly concerned about – those who register multiple times and those who may actually be research bots rather than real people – but only within your own panel. Independent panel verification services that work across all the panels of those who subscribe to them provide the only viable cross-industry method to weed out these most damaging of fraudulent respondents.

We asked companies who operate their own panels (a subset of 110 of the 250 companies researched) whether they subscribed to an independent panel verification service (Figure 5). And for most, the answer is no. Overall, just 24 percent of companies use these services. Uptake appears to relate strongly to company size, with large firms more than twice as likely to use these services than smaller operators.

As these services rely on a subscription, cost may be a deterrent to smaller operators, but there could also be technical complexities to overcome, which are more difficult with companies with fewer technical resources in-house. Perhaps these services need to evaluate how attractive their services are to the smaller operator.

There was also markedly less uptake in Europe than elsewhere, for which we have no ready explanation beyond noting the observation.

Are surveys getting any shorter?

The debate over the viability of mobile surveys, as well wider concerns over participation and engagement in survey research, made us curious to see if this heightened awareness of survey duration was having any effect on the lengths of surveys being fielded (Figure 6). We asked whether surveys were getting shorter and, if so, what active steps were firms taking to reduce survey length.

It seems there is a weak trend toward shorter surveys, with one-in-three observing a reduction. But this has to be set beside the majority who see no change or even see them getting longer.

In a separate question, we asked respondents what they considered the natural limit of interview length for telephone, online and mobile surveys to be. The mean and medians for each show a fairly broad consensus over how long they should be – which we suspect is a lot shorter than they often are (Table 2). The median probably gives a better indication than the mean, as each question had a long tail of responses. Practitioners clearly recognize that mobile must be drastically shorter than either online or telephone.

As regards steps being taken to reduce the length, 50 percent cited policies or best practice guidelines, 42 percent said they were using survey logic or adaptive surveys to reduce the length delivered to individual participants, 24 percent will consider breaking up long surveys into smaller surveys (which many mobile practitioners advocate) and 21 percent are favoring semi-structured interviews instead of seemingly endless grids and batteries of scales. Thirteen

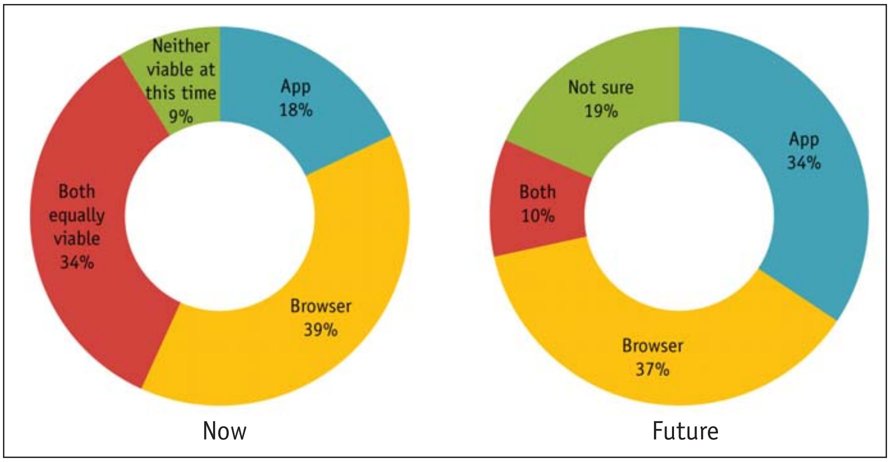

Figure 7: Preference for Apps or Mobile Browsers to Deliver Mobile Surveys
(N = 250)
Q1: "Which method do you consider is most viable at this time for administering mobile surveys - mobile app or mobile browser?"
Q2: "Which method do you think will dominate in the future, as the technology matures?"

percent pointed to "other measures," but we don't know what these are.

Attempts to limit survey length seem to be an aspiration still, rather than a work in progress.

A bright future for mobile apps

Mobile surveys continue to be one of MR's hottest topics at industry events. For the technology providers, opinion appears polarized between mobile surveys using smartphone apps as the way forward versus building dedicated survey apps to exploit the full potential of the phone. For the casual survey taker, a browser-delivered mobile survey makes more sense. It requires a level of trust and probably too much effort to download an app onto your smartphone simply to take a one-off "quick survey." Browser surveys, however, are limited in their ability to integrate the other features of a smartphone, such as capturing pictures or video or using reminders for diary surveys.

We did not explain these nuances to our survey audience but simply asked which approach they think is most viable today and which shows most promise for the future.

Looking at Figure 7, apps are definitely seen as the underdog at present. But those developing apps should take cheer from the survey's prognosis for the future – where the number thinking apps are the way forward virtually doubles. Yet the number favoring browsers hardly changes – it is those who think both have merit that diminishes.

What this seems to demonstrate is, ironically, the opposite: that software of the future needs to be able to offer solutions to both camps. The app may be ascendant but the browser is not going away.

A continuing niche role for MROCs

The survey looked at communities in 2009 and established then that only 17

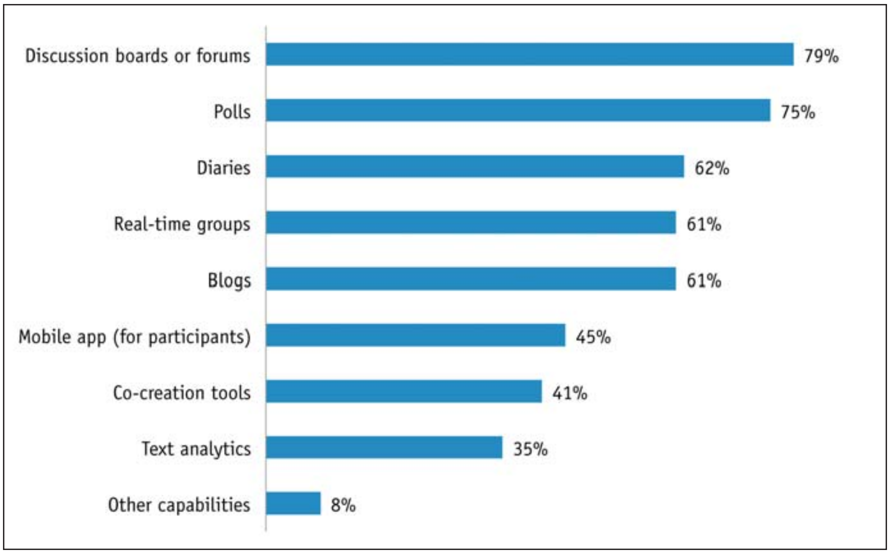

Figure 8: Technical Capabilities Required by MROC Practitioners
("Which of these specific capabilities do you require in your research community software platform?" N = 85. Among those operating or planning to operate research communities.)

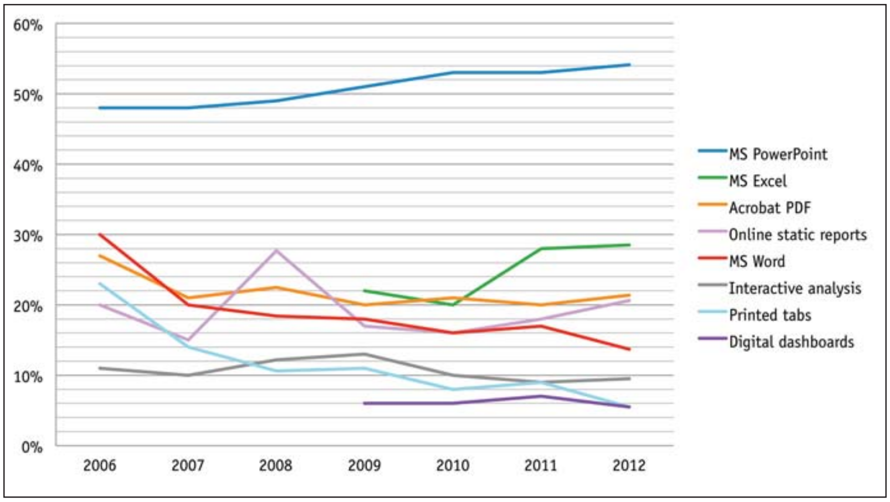

Figure 9: Research Distribution Methods in Use

percent of firms operated communities, with a further 27 percent planning to introduce them and 56 percent stating they had "no current plans" for communities. We asked this question again for 2012 and the numbers have not increased. Just 16 percent state they operate at least one community, which is virtually unchanged. Only 18 percent have an intention to launch an MROC service, while 66 percent say they have no plans.

The same picture emerges from the actual number of communities operated by the minority that do: More than half run fewer than five and a very small number of firms operate a lot of communities. Our conclusion is that there are still not many communities out there.

Communities are not as well-served with software solutions as conventional research so we were interested to know what kinds of features MROC researchers and operators needed (Figure 8). While there is clear consensus about the need for forums and polls, a substantial majority also want real-time groups, diaries and blogs in their toolkits. Almost half (45 percent) of those responding make a link between communities and mobile participation and want to see a mobile app for community members to use. Mobile apps are particularly useful in fulfilling another priority need: the diary survey.

In another question, we discovered that only 27 percent of firms use the same software to run their communities and their other online research or panels; 55 percent use dedicated community software and 18 percent supplement online survey tools with specialist community tools.

Long-term trends on reporting methods

We ask our participants what percentage of their projects involve each of the eight principal methods of distributing research data or findings (Figure 9). For many years now, this study has shown that market researchers have a dependency on PowerPoint as well as other Microsoft Office products, which keeps other more advanced methods in the shade.

Overall, there has been little change at the high end – demand for digital dashboards, interactive analysis and online static reports remains fairly flat.

However, when we dig a little deeper into the data, for the first time in 2012, we see a glimmer of a possibility that some sections of the industry are starting to make more use of other specialized methods.

It is noticeable that in 2012 North American companies report making greater use of online static reports. In this region, 26 percent of projects are delivered in this way, compared with 16 percent and 18 percent for Europe and Asia-Pacific. It is also more prevalent among large companies (21 percent) versus small companies (a mere 8 percent).

A similar difference is apparent with dashboards. In 2012, large companies claim they are delivering 13 percent of their projects in this way, compared to 7 percent for medium-sized companies and 3 percent for small companies. It is a pattern often observed in this study over the years – that smaller companies find it more difficult to embrace many of the more technologically advanced methods.

The use of Excel seems to have experienced a recent surge. We consider this perhaps a sign that market researchers now think it more important to give clients reports that can be manipulated. However, this also raises issue of ethics and trust and the authority of the research company, as it relies on considerable care on the part of the user when using Excel not to manipulate the findings in ways that make findings unreliable or even misleading. Is this another triumph of expedience over efficacy?

Tim Macer is managing director, and Sheila Wilson is an associate at meaning ltd., the U.K.-based research software consultancy that carried out the study on which this article is based. They can be reached at tim@meaning.uk.com or at sheila@meaning.uk.com.

••• research education

Next in line, please

What skills and abilities are young researchers being taught?

| By Joseph Rydholm

snapshot

Interviews with program directors and employers offer a look at graduate- and higher-level marketing research education and what companies are looking for in their new MR hires.

Adaptability. It's a key component of survival, whether you're talking about a species or a business discipline. As the end users of marketing research change their perceptions of it – Who owns the research process? What is its value relative to big data-generated forms of information? What is its strategic business role? – they're also changing the definitions of what a marketing researcher is and what skills are required to do the job.

In conference presentations and in the media over the past few years, those who hire and train researchers have repeatedly talked of how they are casting a wider and wider net in their search for candidates with the right mix of skills. After all, if the ideal researcher is a Renaissance woman or man who can synthesize the data, crunch the numbers, see the big picture, make the findings business-relevant and deliver the final report with clarity, concision and maximum impact, the traditional qual vs. quant dichotomy (if there ever was such a thing) has lost its currency in favor of something at once more broad and more nuanced.

So what's the view from the people whose jobs revolve around teaching the next wave of marketing researchers? Will there be enough newly-minted analysts bearing the requisite skills to carry the industry forward? Based on conversations with several of those involved, the answer seems to be yes.

Rising levels of interest

While the increase in the number of programs focusing on marketing research at the graduate or higher level has not been exponential in recent years, it has been steady and administrators report rising levels of interest in their programs. "Interest is strong – and growing," says Charlotte Mason, professor and head, department of marketing, director, Coca-Cola Center for Marketing Studies, Terry College of Business, the University of Georgia, Athens. "When I came to UGA in 2008 as director of the master

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of marketing research program, applications were about 110 a year – now we are at 170 or more."

Richard Spreng, associate professor of marketing, director, master of science in marketing research, department of marketing, Broad Graduate School of Management, Michigan State University, East Lansing, Mich., concurs. "It is definitely growing here at MSU and that is probably due to the presence of our master of science in marketing research program. As a result of that program, we have had a fall career-exploration event at which we bring in executives from marketing research suppliers and corporate researchers to talk to undergrads about research careers. We contact other colleges and universities in Michigan and invite their students too. Feedback from this event has been very positive and students begin thinking about a career in marketing research and a graduate degree in marketing research."

Share a drive

While the offerings vary somewhat in coursework and area of specific focus (see accompanying directory of programs), they all seem to share a drive to produce the kind of well-rounded practitioners the industry needs. At the University of Texas Arlington's master of science in marketing research program, for example, Director Bob Rogers says a focus is on project management throughout and across the coursework. "Our advisory board said, 'We don't want just a course in project management, we want the skills emphasized in every one of the classes.' So our goal has been to have all of our courses involve both teamwork and project management," he says.

At the A.C. Nielsen Center for Marketing Research at the University of Wisconsin – Madison, Director Kristin Branch says, "We teach MR methodologies that are used to find consumer insights but our program has a strong focus on what to do with those insights and synthesize and integrate them with the whole business and drive impact on the marketing and business strategy."

"We aim to have a highly rigorous program with a heavy dose of skills – especially quantitative – combined with business acumen and consultative skills," says Mason. "My advisory board emphasizes the need for technically skilled graduates who truly understand the business questions and applications and who can communicate with different stakeholders."

"As a new program, we designed it to be up-to-date when we started three years ago," says Spreng. "But we built in a great deal of flexibility so each year we have made changes in content in the program. For example, this year we utilized an online community that the students managed for the semester. Our coursework will see continued development of newer methods, like online communities, mobile and social research. In addition, we expect continued growth in teaching and practice in the consulting aspect of research and more development of the integration of methods."

"Technology is changing – which means that we need to be current," Mason says. "Topics such as online research communities, mobile research, big data, text mining, social media research and new quantitative methods need to be incorporated into the curriculum. Rather than offer courses in these topics, many are incorporated into existing courses. For example, a course in advertising and promotion management now includes new digital channels in addition to the traditional channels. Similarly, a course in data collection methods can include social media along with focus groups, surveys and experiments. And methods courses such as econometrics include examples using digital data."

Ah yes, big data. That too is being addressed. "We definitely are adjusting our courses and our exposure to students to represent the unspecified data sets that are a reality right now," Branch says. "With big data, I think the lines are going to blur between the marketing research department and the IT department. But the consultative skill of what to do with the insights and move the business forward will remain a distinct skill that will be relevant regardless of where the information comes from, whether it's big data or a one-off observation."

As for other newer approaches like neuromarketing or behavioral economics, Rogers sees a challenge – though a welcome one – in incorporating them into marketing research education. "In the past, we have been explaining what consumers do using very traditional marketing models but I kind of like to see the emergence of things like neuromarketing or behavioral economics. How we integrate them into graduate education will be a challenge, especially neuromarketing, because it's a long way from what we have historically done in the business school setting."

More to be done

While the industry actively and enthusiastically supports the work of the educators in training the next crop of researchers, there is still more to be done. "On a macro level, we believe that more emphasis on leadership skills and understanding business dynamics would be beneficial," says Holly Jarrell, chief client services officer, GfK Consumer Experiences North America, New York. "Additionally, programs that, at minimum, touch upon skill sets like data visualization and data integration would improve traditional market research curricula."

"Specific to market research, students don't have nearly enough understanding of the complexities of sampling," says Melanie Courtright, vice president of research services at Research Now, Plano, Texas. "They understand a bit about purely academic sampling concepts but with all of the changes in the methods available to reach people where they are, and with the changes to access by phone, Internet and mobile devices, sampling is an art and a science that isn't focused on in any truly practical way."

Lack of awareness

Though interest in enrolling in the programs is generally high, many of those interviewed for this story – educators and employers – cited a general lack of awareness of marketing research among students and young workers and the many and varied disciplines and skills it encompasses, beyond writing surveys and analyzing the resulting data.

"As an industry, I think we do a shockingly poor job of marketing our profession," says Courtright. "Our professionals are well paid, well-traveled and well-rewarded. Work-life balance is generally high and we typically love what we do. This message needs to make it into the minds of high school students, along with a basic understanding of what we do. Granted, it would be a huge undertaking but we suffer for not having a method to acquire the brightest minds. As major players get into the space like Google, Facebook, Twitter and others, this may change but we definitely need an industry-wide focus on educating the population on what we do, why we do it and why we love it."

"I think research suffers from an awareness problem among young professionals," says Branch. "One of my passion areas is meeting with students and young workers to talk about career pathing and how to think about a field. Because someone who has an interest in marketing but is more curious about human behavior and why consumers do what they do, along with the analytical side of marketing, often doesn't even know that marketing research is a field that they could go into."

"The focus on big data and data integration has made careers in our industry a bit hotter," Jarrell says.

What are employers looking for?

So, once a new researcher hits the streets, what should he or she be good at? And, for those of you who are already employed but longing for greener pastures, what are some of the capabilities and qualities that prospective employers require of their new hires?

Kym Frank, vice president, strategic insights at New York media firm Optimedia: "My wish list for new employees includes a passion for knowledge, adaptability, fearless creativity, confidence in front of a group and the ability to tell a convincing story. Regardless of their research specialty, be it digital media, quantitative research, social listening or anything else, it is vital they understand the entire research landscape. It is not necessary to be a master of every technique; they just need to have a holistic awareness of the tools that are available to address every challenge. As the saying goes, if all you have is a hammer, everything looks like a nail.

"I find many recent graduates are fantastic at gathering data and building charts and graphs but they lack the ability to analyze the data in a meaningful way. Data collection and graphical depiction of that data are great skills and indeed our industry is in need of more individuals who have a passion for data but too many researchers leave the storytelling to someone else.

"Working on the client side and working on the vendor side both have their unique challenges. On the vendor side, it may be necessary to have an expertise in a variety of industry verticals and juggle innumerable client personalities. On the client side, resources may be limited both in terms of research investment and staffing. Either way, the need to approach each issue with an open mind, the ability to tell a compelling story through data and the desire to constantly evolve your skill set are vital," she says.

Holly Jarrell, chief client services officer, GfK Consumer Experiences North America, New York: "The last five years have brought a profound increase in the importance of the digital aspect of data collection, the integration of data, marketing communication and messaging and data visualization. Fluency in these digital areas has become more important as a result. All of these changes have put a premium on professionals who can ably connect the dots on behalf clients."

Melanie Courtright, vice president of research services at Research Now, Plano, Texas: "We look for someone who is skilled in both hard and soft skills pertaining to our industry. The hard skills are often easy to identify and include understanding of survey designs, sampling and data sets, along with organizational and project management excel-

"But more outreach from the industry to the student population would still be beneficial. We see many students who stumble into rewarding MR careers after planning to pursue professions such as psychology or finance."

"As an industry, we have made the profession not so appealing but if you make it more appealing, students have shown they will flock to it," says Stan Sthanunathan, global vice president – marketing strategy and insights, Coca-Cola Company, Atlanta. "If you look at the banking industry or the consulting industry, for example, they attract really solid talent and I'm not sure if that same level of talent is attracted to the market research profession. If they find doing analytical work at Google attractive, why shouldn't they find doing that work in CPG companies or at market research agencies attractive?"

Interest to be sparked

The good news is, while a career in research may not be for everyone, all it takes is for the right candidate to hear the right kind of messages for interest to be sparked. "We recently attended a student professional event at Baylor University," says Courtright. "The event catered to students in the marketing degree plans and there were several hundred attendees. One of the presenters asked how many of these students were considering a career in marketing research and even among this targeted group of students, only one person raised a hand. After we spent an hour talking about market research, we had dozens of students approach us afterwards for more information. While they are all aware of surveys, they didn't realize the scope of the industry and the opportunities available to them."

At New York media company Optimedia, a media trainee program has been successful at introducing college graduates to aspects of marketing research, says Kym Frank, the firm's vice president, strategic insights. "We hire recent college graduates and expose them to a variety of the teams operating at the agency, such as media planning, media buying, corporate development and of course, research. At the end of the program, successful candidates are offered a full-time position on one of the teams. Often, those coming into the program have little prior understanding, or even interest, in the market research profession. After they participate as a member of our team, some realize they do have a passion for research and those who do not develop a taste for it at least develop a respect for what we do," she says.

Securing internships

To make sure the skills the students learn are put into practice and to prepare them for real-world marketing research, several of the programs focus on securing internships that often lead to full-time offers. "We keep saying to the students there are three factors that will help you be successful in this industry," Rogers lence. The soft skills are harder to assess in an interview process but are what make a great hire. Being innately curious and outstanding at problem-solving, getting along exceptionally well with all types of people, staying calm in the midst of a problem and exuding confidence and leadership in all situations are critical; along with being self-motivated and highly reliable. They also need to bring something to the organization that will help us grow and evolve. Even in our most junior positions, we look for people who will help advance the company.

"Five years ago, a candidate could have a subject-matter expertise and their proficiency there was enough to bring them on board. Today, candidates have to be very well-rounded. You can't be good just at data and analytics and lean on others in the organization to carry the weight of the other aspects of a project. Market research is much less siloed in terms of how we operate. Team members certainly have areas of expertise but they also have to be proficient in the basics of all of the functions. Being a data analyst has also changed dramatically in the last five years. What kind of data? What kind of analysis? What kind of data visualization tools? And which analysis tools? Survey data expert or big data expert? Social listening data, behavioral data or survey data?"

Kristin Branch, director, A.C. Nielsen Center for Marketing Research at the University of Wisconsin – Madison: "The biggest gap I continue to hear about from employers is the ability to synthetize insights and to make those insights have business impact. Suppliers and clients alike tell me that the skill set of the future is the consultative skills, the ability to think through complex problems, to synthesize a lot of insights together and then to take a stand and have a point of view and make a difference."

Stan Sthanunathan, global vice president - marketing strategy and insights at the Coca-Cola Company, Atlanta: "This might sound counterintuitive, but as somebody who is a user of research, I am less worried about expertise in technical areas. Because if I hire people with strong technical skills – the kind of people that the research agencies hire – then we end up replicating [the agencies'] work internally and that is really unproductive. So what I look for is really solid storytelling skills, underpinned by best-in-class ability to connect the dots and deliver information with a lot of passion and enthusiasm.

"Also, you must understand the difference between a fact-based presentation and a fact-filled one. People think, if they can highlight the three or four key insights from the morass of information they have on a PowerPoint slide, they are delivering a really strong presentation because they have narrowed down the focus. But if those are the only three or four things you need on the chart, why are you showing the other 37 things? Leaving them out is where the discomfort comes in, because people are afraid that if they don't include a lot of facts, the audience will think their presentation has no substance. And that's where you get the confusion between fact-filled and fact-based presentations. This is a leap that people have to make and it requires a bit of bravery. Some get it, some don't."

says. "One is an understanding and an absolute love of marketing, which is establishing and maintaining relationships with people. The second one is technical skills, which we can provide you. And the third is industry experience, which is why we keep emphasizing the value of having internships built into the program."

As for whether students show a preference for choosing to go into the client side over the vendor side, at Wisconsin, Branch says, the client side seems to win out. "CPG continues to be the main training ground and it offers the most diversity of consumer research-type of efforts, over tech or pharma, for example. But the industry we see catching up is retail. Walmart and Target have really jumped in and started hiring our students and the consumer products firms are having their eyes opened a little bit. It's an interesting trend and the CPG firms' feelings seem to be 'If those retailers are going to start hiring A.C. Nielsen Center grads, then our competitive difference as manufacturers who know consumers really well has the potential to be at risk.'"

At Georgia, Mason says, the placement breakdown is roughly half and half. "Some students have a preference; others think they have a preference and then surprise themselves when they choose an offer from the 'other' side. And others simply look for what seems to be the best fit."

Help attract and shape

So what can current members of the industry do to help attract and shape the next generation of researchers and allow the profession to adapt to a rapidly changing business landscape?

Spread the word. "More and more people are aware that our field is growing and the demand for talent in this field is growing and so it's just a matter of matching those interests," Branch says. "So I spend a lot of time thinking about how to talk to psychology students and sociology students and anthropology students and those studying econ and statistics and taking those interests from when they are 20 and looking at which jobs might be a fit for them by bringing all of their interests together."

"People, businesses and industries face problems and market researchers find the answers for them," says Frank. "As a career choice, what could be more viable than that? The task for us is to ensure that research does not become a backroom function, that we are putting our best talent forward as spokespeople, not just for our companies but as representatives for the industry itself."

Get involved. Branch reports that the researchers on the Nielsen Center's board of advisors say the time they invest pays off in many different ways. "There is a lot of reverse mentoring, where researchers [on the board] stay current on what they need to know. Our board members repeat that back to us a lot: I'm here because I care about helping the industry move forward and helping Wisconsin do its part but I get a lot of personal benefit out of making sure I

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Bentley University (MA)
www.bentley.edu/ms/msma.cfm

DePaul University (IL)
Kellstadt Graduate School of Business
http://kellstadt.depaul.edu/Programs/SpecializedMasterDegree/MSMarketingAnalysis.asp

Clemson University (SC)
College of Business and Behavioral Science
http://business.clemson.edu/departments/marketing/mkt_grad.htm

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stay relevant," she says.

"Incremental industry efforts should be strongly encouraged," says Jarrell. "Industry groups such as ARF or CASRO have established outreach programs to educate undergraduate students about the advantages of research as a career, emphasizing MR's ability to impact marketing activities and business results. GfK's Next Generation competition, which is run in cooperation with the ARF, is one example of an initiative in this area."

"I can sit on the sidelines and complain that what is being taught is not relevant," says Sthanunathan, "but I need to ask myself, what have I done to influence that? I can give a lecture on the skill set that I require as an employer, as I did to the graduating class at the University of Wisconsin – Madison, but that's very passive. That's like pontificating and walking out. I probably need to roll up my sleeves and talk to them to figure out how the coursework needs to be changed if I really want to effect change. I'm looking more inward and assigning blame to us, rather than pointing the finger at the academics and saying they're not doing enough. The academics are bright people. If we are not happy, it is our job to work with them to bring their brightness and our needs together to create something different."

••• the business of research

Still on the upswing

A report on the 2013 Quirk's salary survey of corporate researchers

| By Emily Goon

snapshot

In its fifth year, Quirk's salary survey of client-side researchers shows increasing salaries and satisfaction and for the first time looks at how researchers came to be employed at their current position.

It's hard to believe that Quirk's has just wrapped up its fifth-annual salary survey of client-side researchers. It feels like just yesterday we received our first batch of responses in 2009 and now we have half a decade's worth of data to reflect on. The 2013 survey yielded our largest respondent pool yet, with a total of 1,290 full-time client-side researcher participants – and arguably our most optimistic data.

Having debuted this ongoing study at the height of the Great Recession, it's been interesting to follow how both salaries and outlooks have evolved along with the state of the national and global economy. For the most part, the data over the years has served as a beacon of hope – reminding us that no matter how nihilistic the views of research naysayers may be, the reality of the situation in the eyes of corporate researchers was never quite as bad as was portrayed within the industry or in the media.

While the research industry went through bouts of dissatisfaction in the workplace (2011, specifically) and rashes of wanting to change jobs (again, 2011), client-side researchers have largely toughed it out and are now only the better for it, as the 2013 data shows the highest level of job satisfaction to date, at 75 percent (19 percent somewhat satisfied; 37 percent satisfied; 19 percent very satisfied). Still, as in previous years, money cannot buy happiness in the MR community, as the highest earners are somewhat dissatisfied with their current employment ($149,225) and the second-highest earners are very dissatisfied ($150,560). The lowest earners reported being somewhat satisfied ($124,379).

Best news of all

But corporate researchers have good reason to be as satisfied as ever. Maybe the best news of all for 2013 is that salaries are generally higher across all industries, regions and titles. In 2012, the average total salary hovered around $124,000. This year? $144,000. That's an almost-14 percent lift in one year, suggesting that compensation is

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Total 2013 Compensation, By Region

Region	Base	Bonus	Other	Total
Northeast (CT, MA, ME, NH, RI, VT)	$114,010	$24,075	$22,962	$161,046
Mid-Atlantic (NJ, NY, PA)	$115,427	$23,473	$24,175	$163,075
East North Central (IL, IN, MI, OH, WI)	$97,306	$16,814	$21,683	$135,803
West North Central (IA, KS, MN, MO, NE, ND, SD)	$88,574	$17,917	$15,750	$122,240
South Atlantic (DC, DE, FL, GA, MD, NC, SC, VA, WV)	$99,831	$20,579	$17,750	$138,159
East South Central (AL, KY, MS, TN)	$88,125	$17,211	$21,429	$126,764
West South Central (AR, LA, OK, TX)	$101,051	$17,098	$30,238	$148,387
Mountain (AZ, CO, ID, MT, NM, NV, UT, WY)	$85,708	$11,500	$10,111	$107,319
Pacific Coast (AK, CA, HI, OR, WA)	$114,185	$19,742	$27,667	$161,593
Canada	$86,824	$24,700	$61,333	$172,857
Mexico*	$44,000	$17,333	$0	$61,333
Central and South America*	$82,000	$16,667	$9,500	$108,167
Eastern Europe*	$41,333	$12,800	$0	$54,133
Western Europe	$79,300	$11,929	$22,667	$113,895
Asia	$64,316	$19,000	$41,000	$124,316
Middle East*	$75,000	$4,500	$0	$79,500
Africa*	$40,778	$11,500	$1,000	$53,278
Australia/New Zealand*	$125,000	$20,000	$20,500	$165,500

* Fewer than 10 responses were received from these regions

Total 2013 Compensation, By Experience

Years of Experience in MR	Base	Bonus	Other	Total
< 1 year	$59,484	$25,889	$15,333	$100,706
1 - 2	$63,885	$6,871	$9,778	$80,534
3 - 5	$72,379	$10,913	$17,639	$100,930
6 - 10	$89,835	$14,096	$19,981	$123,913
11 - 15	$108,273	$22,142	$22,392	$152,807
16 - 25	$119,014	$20,238	$24,188	$163,439
>25	$125,272	$30,757	$42,417	$198,445

Total 2013 Compensation, By Degree Achieved

Highest Degree Achieved	Base	Bonus	Other	Total
High-school graduate	$82,500	$20,833	$54,000	$157,333
College graduate	$89,277	$18,329	$18,291	$125,897
Master's program graduate	$104,749	$18,595	$22,812	$146,156
Ph.D. graduate	$127,434	$30,143	$48,130	$205,708

finally catching up with the stronger economy. The largest jump in any one category is that of those researchers who identify as owners/partners, whose salaries rose to $448,944 from $293,818 in 2012 (the first year we included this exact category).

Again, senior vice presidents and vice presidents are earning significantly more than presidents/CEOs/COOs. We called out this discrepancy in our 2012 report and upon further investigation, we found that the sample of respondents with the title president/CEO/COO in 2013 was significantly smaller than that of senior vice presidents and vice presidents (three respondents compared to 71, to be exact). This has perplexed us in previous years and now on our fifth iteration, we are confident in attributing this outlying data point to an inadequate/unequal sample.

Mammoth increases

By industry, 2013 saw mammoth increases in three sectors: automotive, computer hardware/software and technology/IT/Web. Perhaps as a testament to the overall recovery of the automotive industry since the bailout of 2008-2009, the average salary for a corporate researcher in the automotive sector jumped to $209,028. The second-highest salary recorded in this industry was $151,582 in 2009. In the intermediate years, the average salary for automotive researchers hung around $125,000.

The salary progression in the other two categories is probably less surprising, given the advances in – and rapid adoption of – technology over the past five years. The 2013 average in the computer hardware/software industry is $243,257 (the highest in any industry), up from $134,765 in 2012; $101,517 in 2011; $101,077 in 2010; and $113,373 in 2009. A similarly dramatic trend is evident in the technology/IT/Web sector, as the average salary has steadily increased from $82,809 in 2009 to $198,876 in 2013. Not a bad trajectory!

In the lurch

Geographically speaking, the highest salaries are still found on the coasts, as corporate researchers along the East Coast are the highest domestic earners, followed by those on the West Coast. Last year the Midwest and the Rocky Mountain states were roughly tied for the lowest domestic salaries but this year the Midwest pulled ahead to $122,240, leaving the Mountain states in the lurch at $107,319, which, however, is still a very slight increase over the 2012 figure of $103,322.

Internationally, of the countries/regions that generated more than 10 responses, Canada and Asia experienced the greatest deviation from previous years – favorable for Canada, dismal for Asia. In Canada, the aver-

How Did You Come to be Employed at Current Job?

Answer	Base	Bonus	Other	Total
Saw an ad posted on an Internet job board	$88,354	$14,249	$16,019	$118,621
A print newspaper or magazine ad	$92,108	$12,083	$8,846	$113,038
Referred by an employee of the company	$105,723	$21,731	$22,354	$149,807
Received a tip from a friend or family member	$107,942	$22,293	$18,563	$148,797
Posted my résumé on a job board	$87,524	$11,438	$10,200	$109,161
Received a call from a headhunter	$116,211	$20,172	$36,964	$173,346
Contacted a headhunter on my own	$102,793	$14,773	$21,375	$138,941
Sent a résumé to the company	$89,235	$17,342	$22,654	$129,231
At a career fair	$82,786	$10,700	$12,000	$105,486
By networking at an event	$86,083	$10,000	$5,333	$101,417
On a social networking Web site	$102,154	$22,938	$24,750	$149,841
Other	$101,791	$16,845	$15,885	$134,521

How Did You Come to be Employed at Current Job?

Answer	Response	%
Saw an ad posted on an Internet job board	278	23%
A print newspaper or magazine ad	74	6%
Referred by an employee of the company	267	22%
Received a tip from a friend or family member	105	9%
Posted my résumé on a job board	22	2%
Received a call from a headhunter	166	14%
Contacted a headhunter on my own	29	2%
Sent a résumé to the company	99	8%
At a career fair	14	1%
By networking at an event	12	1%
On a social networking Web site	26	2%
Other	112	9%

age salary increased from $98,926 in 2012 to a whopping $172,857. Asia, on the other hand, decreased from $141,316 in 2012 to $124,316 in 2013.

Generally, as in all previous years, researchers with more experience and higher degrees can expect to continue to earn more as they age, as the highest salaries are found among those over 66 years old and with over 25 years of experience and/or a Ph.D. While there is some fluctuation in salary among those with less than one-to-two years of experience, as we've seen in previous years, it's safe to say that tenure and educational development within the research industry pay off in spades.

The improving job market

Even as the economy continues to recover each year, researchers aren't looking to take advantage of the improving job market. Roughly the same percentage of respondents said that they are somewhat unlikely (12 percent), unlikely (19 percent) or very unlikely (22 percent) to seek employment at a different company in 2013 as they were in 2012 (53 percent vs. 54 percent, respectively). This continues to be a huge improvement over those looking to change jobs in 2010 and 2011. By comparison, only 44 percent were somewhat unlikely, unlikely or very unlikely to seek new employment in 2011.

Oddly enough, as client-side researchers are more and more content to stay put, more companies are expected to hire additional market research employees in 2013 than ever before. So this could be good news for those looking for a new position as the candidate pool dwindles and job openings increase. For reference, in 2010, 33 percent of respondents said their company was somewhat likely, likely or very likely to hire additional MR employees; 37 percent in 2011; and 38 percent in 2012. This year, the figure jumped another four points to 42 percent, which is well outside the study's margin of error. Specifically, 14 percent said it is very likely that their company would hire additional MR employees, 11 percent likely and 17 percent somewhat likely.

Generally speaking, the amount of time researchers spent conducting or coordinating and analyzing research has remained relatively steady over the past five years, with 40-44 percent of respondents spending 75 percent or

Total 2013 Compensation, By Industry				
Industry	**Base**	**Bonus**	**Other**	**Total**
Advertising/Public Relations	$102,300	$22,576	$23,833	$148,709
Agriculture	$105,143	$11,250	$33,500	$149,893
Automotive	$104,889	$20,389	$83,750	$209,028
Banking/Financial	$103,163	$22,505	$10,842	$136,509
Building Materials/Products	$72,778	$5,200	$1,000	$78,978
Computer Hardware/Software	$131,762	$42,067	$69,429	$243,257
Construction/Housing	$92,500	$9,000	$20,000	$121,500
Consulting	$109,364	$15,357	$29,333	$154,054
Consumer Goods	$106,275	$16,205	$15,000	$137,480
Education	$83,415	$9,316	$10,400	$103,130
Entertainment	$127,125	$35,739	$50,143	$213,007
Food/Beverage	$96,778	$15,046	$27,765	$139,589
Government	$94,154	$18,000	$0	$112,154
Health Care/Pharmaceuticals	$109,053	$20,737	$26,727	$156,518
Hospitality (hotels, restaurants, etc.)	$88,143	$20,417	$41,000	$149,560
Insurance	$99,677	$20,704	$14,045	$134,427
Manufacturing	$96,571	$19,887	$20,759	$137,217
Media/Publishing/Information	$95,532	$14,857	$23,625	$134,015
Non-Profits	$79,736	$5,520	$2,600	$87,856
Retail	$93,452	$16,037	$21,750	$131,239
Technology/IT/Web	$115,438	$23,216	$60,222	$198,876
Telecommunications	$92,200	$15,083	$13,875	$121,158
Transportation	$90,167	$57,571	$8,333	$156,071
Travel	$94,867	$11,174	$15,714	$121,755
Utilities/Energy	$88,723	$16,417	$7,000	$112,140
Other	$92,891	$19,931	$20,200	$133,022

Total 2013 Compensation, By Annual Revenue				
Annual Revenue/Sales	**Base**	**Bonus**	**Other**	**Total**
< $1 million U.S. dollars	$83,040	$40,111	$121,000	$244,151
$1M - $3M	$83,156	$23,667	$15,500	$122,323
$3M - $6M	$92,524	$15,467	$8,000	$115,990
$6M - $10M	$76,000	$16,462	$6,500	$98,962
$10M - $50M	$88,822	$18,229	$11,231	$118,282
$50M - $100M	$89,678	$20,455	$5,400	$115,533
$100M - $300M	$88,875	$17,561	$21,643	$128,079
$300M - $500M	$91,146	$14,778	$33,091	$139,015
$500M - $1 billion	$102,366	$16,914	$11,375	$130,655
>$1 billion U.S. dollars	$110,553	$20,771	$27,000	$158,324

more of their time dedicated to MR. For the past five years, the percentage of researchers who report working the same amount or more has hovered around 60 and 35 percent, respectively. So each year a little over one-third of researchers are adding more hours to their workweek.

Once more, the plurality of respondents identify as market research managers (30 percent), followed distantly by market research director or senior director (18 percent). And these MR managers and directors are part of tiny teams, as the majority of respondents (52 percent) are on a team of one-to-five full-time MR employees and 54 percent are not responsible for supervising any employees. This figure regarding management has remained steady over the history of the survey but jumped from under half to over half for the first time in 2012.

Ahead of inflation

Over three-quarters of respondents said that their base salary for 2013 increased over the previous year, which is in line with the data from 2012. Over 56 percent received a base salary increase of 1-4 percent, which is at least enough to stay ahead of inflation.

Approximately one-third of client-side researchers enjoyed a bonus increase and approximately 81 percent reported that their 2013 bonus increased or stayed the same. Nearly 20 percent reported a bonus decrease, which is in keeping with 2012 numbers but still a disappointing jump over the 10 percent in 2011 who said that their bonus decreased.

For the first time, we're seeing many researchers saying that they are in new positions too fresh to compare to last year or to have warranted a raise or bonus. Perhaps those 34 percent last year who said they were considering pursuing new employment were successful!

"I assumed a new role at the end of 2012."

"New employee – no bonus or dividends yet."

"I started in November 2012 so it's too early for bonuses or dividends."

"I just started working for the company. I did not receive a bonus or corporate options in 2012 but will in 2013."

"I have been at this job for only three months – straight out of grad school. This is my first year so increase in bonus does not apply."

"I started a new job in January of 2013. I will be getting stock options but don't know to what level at this point."

Finally opening up

In past years, we've asked respondents what they like most about working in MR, what they like least, what the biggest challenges facing the industry are and what skill set marketing researchers will need to possess in the coming years. With all the talk of the job market finally opening up and the increasing likelihood of companies looking to increase MR staff, this year we were curious to see how respondents came to be employed at their current companies. And lest you think that the results are skewed by

Total 2013 Compensation, By Job Title

Job Title	Base	Bonus	Other	Total
Owner/Partner	$153,917	$144,778	$150,250	$448,944
President/CEO/COO	$124,667	$45,000	$0	$169,667
Senior Vice President or Vice President	$167,732	$44,315	$40,607	$252,654
Market Research Director/Senior Dir.	$133,035	$25,500	$28,819	$187,354
Market Research Manager	$97,355	$13,296	$15,146	$125,797
Account Executive/Manager	$36,750	$8,000	$1,000	$45,750
Customer Insights Manager	$98,453	$13,397	$23,400	$135,250
Director of Marketing	$123,950	$50,176	$12,600	$186,726
Marketing Manager	$87,136	$9,105	$2,000	$98,242
Brand Manager or Product Manager	$79,222	$7,000	$0	$86,222
Communications Director/Manager	$105,714	$7,000	$16,000	$128,714
Project Manager	$84,694	$16,769	$5,000	$106,464
Business Development	$96,400	$40,500	$15,667	$152,567
Senior Research Analyst	$76,404	$7,544	$6,625	$90,574
Research Analyst	$58,591	$13,426	$7,056	$79,072
Business/Market Analyst	$66,871	$8,300	$72,000	$147,171
Statistician	$86,889	$12,667	$10,000	$109,556
Research Assistant	$35,417	$2,800	$5,500	$43,717
Sales/Account Representative	$23,000	$16,000	$0	$39,000
Administrator/Coordinator	$49,000	$3,500	$1,500	$54,000
Consultant	$96,696	$10,462	$5,000	$112,157
Other	$86,068	$18,793	$40,000	$144,861

Total 2013 Compensation, By Gender

Gender	Base	Bonus	Other	Total
Male	$107,456	$23,688	$27,748	$158,893
Female	$94,931	$15,404	$20,701	$131,036

How Likely is it That Your Company Will Hire Additional Market Research Employees in 2013?

Answer	Response	%
Very Unlikely	277	22%
Unlikely	202	16%
Somewhat Unlikely	138	11%
Undecided	106	9%
Somewhat Likely	211	17%
Likely	133	11%
Very Likely	169	14%

researchers who've been in the same position since long, long before the advent of social media and the influx of networking events, consider the trend noted earlier regarding respondents too new in their positions to have past salary data to compare to!

While recent data have indicated that social media is being used more and more to post jobs and find talent, a mere 2 percent of respondents found their current position via social media. Only 2 percent had success at a career fair or networking event but personal networking in general is one of the most powerful influencers. Personal referrals by an employee within the company or a tip from a friend or family member were two popular methods of finding employment at 22 and 9 percent, respectively. Turns out it really is all about who you know!

Still, the most reliable way to find employment is using an Internet job board (23 percent), which isn't surprising as the Jobs section on Quirks.com is one of the most-visited areas of our Web site! And as far as posting ads goes, employers would be wise to rely on the Internet and not a print newspaper or magazine, as Internet postings beat out print ads by 17 percent.

Another 14 percent were fortunate enough to be contacted by a headhunter and 2 percent reached out to a headhunter on their own. Fortunate because those who received a call from the headhunter about a position earn on average over $173,000, which is almost $14,000 more than the next-highest-paying methods (referral from friend or family member and social networking) and almost $30,000 more than the average salary among corporate researchers. Conversely, the unfruitful career fairs and networking events seem to be doubly so, as these methods yielded the lowest salaries by a wide margin, at $105,486 and $101,417, respectively.

Take the advice

Finally, we may want to take the advice of the many, many articles we've published regarding mobile research and the importance of mobile compatibility and revisit how we design next year's salary survey, as there were several complaints about it not being mobile-friendly! Apologies!

"Slider hard to use on cell phone."

"Slider doesn't work well on mobile device."

"This page is ridiculously hard to fill out using an iPhone."

Happy to report

After five years of data, it's clear that the research industry is as strong as ever and growing in all the right ways. We're happy to report that corporate researchers seem to be flourishing in their positions and we hope to see our readers continue to find satisfaction – and growing salaries – in the years to come.

Visit www.quirks.com/jobs/research-salaries/Market-research-salary-by-title.aspx for a breakdown of compensation for client- and provider-side research job titles, including crosstabs by age, gender, location and more.

Names of Note

■ *Starbucks Coffee Company*, Seattle, has named **Matthew Ryan** global chief strategy officer.

■ **Jake Steadman** has joined *Twitter UK*, London, as head of research.

■ *Resonate*, a Reston, Va., marketing technology company, has named **Michael Horn** vice president, research.

■ **Alex Boettcher** has joined *Paramount Direct Marketing*, Erie, Pa., as market research coordinator.

■ Columbia, Md., research company *Arbitron Inc.* has appointed **Monica Narvaez** as Hispanic broadcaster account specialist.


Narvaez

■ *MarketVision Research*, Cincinnati, has promoted **Tom Donnelly** and **Renu Dalal** to vice president.

■ New York research company *Ipsos Health in North America* has hired **Elys Roberts** as president and CEO and **Andrew Grenville** as chief research officer.

■ *The Brand Activation Association*, New York, has named **Marc Shaw** of Unilever North American chairman of the board and **Pam Kermisch** of General Mills vice chairman for the 2013-2015 term.

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■ *ESOMAR*, Amsterdam, the Netherlands, has named **Pravin Shekar** council treasurer.

■ *BrainJuicer Group PLC*, a London research company, has hired **Maria Spinelli** as vice president, BrainJuicer Southeast Asia. Spinelli will be based in Singapore. The company has also named **Will Leach** vice president, BrainJuicer Behavioral Labs. Leach will be based in Texas.

■ **Lung Huang** has joined London research company *dunnhumby Ltd.* as vice president, digital advertising, global partnerships. Huang will be based in New York.

■ **Melanie Shreffler** has joined Johnson City, Tenn., research company *Smarty Pants LLC* as trends and insights guru. Shreffler will be based in New York. Additionally, **Elisabeth "Liz" Lamar** has joined the company as qualitative research prodigy. Lamar will be based in Nashville, Tenn.


Shreffler


Lamar

■ Princeton, N.J., research company *ORC International* has added two members to its product strategy, innovation and growth team: **Scott Laing** as vice president and senior director; and **Chris Robson** as vice president and senior director, analytics.

Separately, **Richard Noden** has been named research director, customer strategy and technology, for ORC International in London.

■ London research company *Hall & Partners* has hired **Chris McPartland** as partner and **Lucy Ireland** as research director. The New York division of Hall & Partners has hired **Erica Pascual** as account manager and **Amanda Perlstein** as account executive.


Perlstein


Moore


Albert

Additionally, Hall & Partners Health has promoted **Rachel Moore** to account director and **Aurora Albert** to account manager.

■ **Liz Musch** has been named global CEO of New York research company *Ipsos ASI*. Musch will be based in Paris.

■ **Nicole Phillips** has joined *Switch: Liberate Your Brand*, a St. Louis marketing agency, as director, strategic planning and business development. Research will be among her responsibilities.


Phillips

■ Los Angeles research company *Kelton* has hired **Anita Chu** as senior director, quantitative research.

■ *Evolution Marketing Research*, Blue Bell, Pa., has hired **Ian Fureman** as director, research; **Leigh McCullough** as associate methodologist; and **Shannon Sesa** as field coordinator.

■ Leeds, U.K., research company *Brass Insight* has hired **Daniel Eddy** as account director and **Lauren Elliot** as senior research executive. Eddy will be based in London.

■ New York research company *Ipsos Healthcare* has appointed **Jackie Ilacqua** as global head of syndicated services. Ilacqua will retain her existing role as president, global oncology.

■ Miami research company *QualMetrix* has named **Adam House** CEO.

■ **Bj Kirschner** has joined New York research company *All Global* as director, qualitative research operations.

■ *Webtrends*, a Portland, Ore., research company, has appointed **John Harrison** as vice president, client experience.

■ **Mansour Fahimi** has been named senior vice president, sampling statistics, at New York research company *GfK*. Additionally, **Neil Mathis** has joined GfK as senior strategist and vice president, consumer group.

■ **Scott Royal** has been named president and CEO of New York research company *Abt SRBI*.

■ Conway, N.H., research software company *Rapid Insight Inc.* has hired **Ric Pratte** as president and COO.

■ *EasyInsites*, a Surrey, U.K., research company, has hired **Martin Levett** as Web and survey programmer. The company has also promoted **Rebecca Batey** to account executive and **Elaine Fowler** to research executive.

■ *MRops*, a Warrington, Pa., research company, has hired **Bill Guerin** as chief client officer and **Jon Harding** as executive vice president.

■ **Thomas Fuller** has joined *SIS International Research*, New York, as managing director, Asia-Pacific. Fuller will be based in Shanghai, China.

■ Shelton, Conn., research company *SSI* has appointed **Max Weber** as managing director, Asia-Pacific, and **Satoshi Komatsuzaki** as country manager, Japan.

■ Cincinnati research company *dunnhumbyUSA* has promoted **Brian Higdon**, **Sean Hannon** and **Dawn Valandingham** to vice president, client leadership; **Megan Moglia** and **Susan Visconte** to vice president, client solutions; and **Dawn Shirley** to vice president, communications and media.


Pannu

■ **Nitu Pannu** has joined London research company *E-Tabs* as client consultant.

■ *The NPD Group Inc.*, a Port Washington, N.Y., research company, has promoted **Perry James** to president, U.S. hardlines; **Mike Leahy** to president, Canada and Latin America; **Diane Nicholson** to president, U.S. softlines; **Arnie Schwartz** to president, U.S. food; **Karl Werner** to president, U.S. technology; **Lora Morsovillo** to president, office supplies; **Caroline Pisaniello** to vice president, product management; **Fernando Rubio** to president and general manager, Mexico; **Ann Roberts** to president, SupplyTrack; and **Giovanna Pirrone** to vice president, Europe retail business group.

Finally, NPD has hired four market research analysts to its DisplaySearch division: **Todd Fender**, senior analyst, professional and commercial displays; **Tina Teng**, senior analyst, smartphones; **Moo-Youl Huh**, analyst, small/medium displays and touch; and **Peter Su**, analyst, large-area TFT LCD.

Research Industry News

News notes

■ Reston, Va., research company **comScore Inc.** received notice in April of a class action lawsuit filed on behalf of consumers by Chicago law firm Edelson McGuire, alleging that comScore "improperly obtained and used personal information from [users'] computers." Federal Judge James Holderman certified a class of "all individuals who have had, at any time since 2005, downloaded and installed comScore's tracking software onto their computers via one of comScore's third-party bundling partners." Holderman also certified an additional subclass of "all class members not presented with a functional hyperlink to an end-user license agreement before installing comScore's software onto their computers."

ComScore maintains that the suit is factually inaccurate and without merit.

■ Columbia, Md., research company **Arbitron Inc.**'s stockholders have voted to approve Arbitron's acquisition by New York researcher **The Nielsen Company**.

Separately, Arbitron has reached a settlement agreement with *WKYC-TV Inc.*, Cleveland, to resolve the legal action brought by Arbitron for copyright infringement, trademark infringement and false designation of origin under the Lanham Act.

Arbitron alleged that WKYC-TV copied and distributed its copyrighted audience estimates without permission and that WKYC-TV improperly used Arbitron's trademarks to create the false impression that non-Arbitron audience estimates for Internet radio service Pandora were genuine Arbitron products.

■ Atlanta research technology company **ActiveGroup Ventures Inc.** closed its doors on April 5.

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Acquisitions/transactions

■ New York call center **1-800 We Answer** has acquired New York research company **TMR Inc.**

■ New York consulting firm **Accenture** has acquired **ChangeTrack Research**, Sydney, Australia.

■ Seattle research company **Blink Interactive Inc.** has acquired certain assets of the qualitative research services division of **The Gilmore Research Group**, Seattle. Blink's new division has been named Northwest Insights and is being managed by Gilmore's Donna Glosser.

■ New York research company **Ipsos in North America** has agreed to sell its theatrical research division, the **Motion Picture Group**, to a private investment group.

■ **ASL Marketing LLC**, Farmingdale, N.Y., has agreed to acquire certain assets of **Student Marketing Group** to combine both parties' data content, aggregation and analytics of the youth, young adult and student demographics.

■ **National Promotion Reports**, New York, has acquired Oakbrook Terrace, Ill., research company **Promodata** and its food service industry report Volume-Trak.

Alliances/strategic partnerships

■ Fresno, Calif., research company **Decipher Inc.** and **iModerate Research Technologies**, Denver, have partnered to integrate iModerate's qualitative conversation technology into Beacon, Decipher's survey software platform. The offering will be available to both companies' clients.

■ Research companies **Focus Pointe Global**, Philadelphia, and **Mystery Researchers**, Atlanta, have formed a strategic alliance under which each company will market the other's suite of research services.

■ Vancouver, B.C., research company **Vision Critical** and **Dentsu Marketing Insight Inc.**, Tokyo, have partnered to offer insight communities in Japan.

■ **TiVo Research and Analytics Inc.** (TRA), New York, has agreed to make data from New York researcher **The Nielsen Company** available as a parallel resource within TRA's business intelligence data solution for mutual subscribing clients.

■ Research companies **Management Science Associates Inc.** (MSA), Pittsburgh, and **IRI**, Chicago, have partnered to offer the SymphonyIRI AllScan Convenience Store Tracking Service to the convenience distributor community via MarketView on Demand. MSA will act as the exclusive reseller of MarketView on Demand's projected consumer take-away data.

Awards/rankings

■ **Karri Bass** of Illumination Research, Mason, Ohio, has been named the Small Business Owner of the Year for the State of Ohio for 2013 by the **U.S. Small Business Administration**. The Small Business Person of the Year is selected based on growth in sales, increase in number of employees, financial strength, innovativeness of product or service and contributions to community-oriented projects.

■ Vancouver, B.C., research company **Vision Critical** ranked fourth in the

Branham300 list of top-five Canadian software-as-a-service companies by **Branham Group Inc.**, an Ottawa, Canada, marketing company. Vision Critical has also been identified as the 10th top software company and 60th information and communication technology in Canada.

■ **The Advertising Research Foundation** (ARF), New York, has named the winners of its 2013 Great Mind Awards: **Jeff Bander** of Sticky, Innovation Award; **John Dimling** of Nielsen Media Research and Net Ratings Inc., Lifetime Achievement Award; **Bob Barocci** of the ARF, Lifetime Achievement Award; **Claudia Perlich** of Media6Degrees, Great Mind Innovation Award; **The Palmerston Group** and **Cole & Weber United**'s "Project Butterfly: Escaping the Net" campaign, Quality in Research Award; **Aurora University**'s "Exploring Uncharted Territories: Addressing the Emerging Hispanic Market" research project, GfK Next Generation Award; and **Jenny Vandehey** of SMG, Rising Star Award.

The ARF's President's Award winners were **Crystal Barnes**, Nielsen; **Kelle Coleman**, Nielsen; **Justine Faeth**, ESPN; **Lauren George**, CBS; **Tamara Hood**, Viacom Media Networks; **Leah McTiernan**, Ipsos; **Frances Quattrocki**, comScore Inc.; **Kyle Rondeau**, Arbitron Inc.; **Becarren Schultz**, Ameritest; **Nicole Tomei Zwolinski**, GfK; **Kelly Weikes**, Millward Brown; and **Jill Wiltfong**, Ipsos.

Additionally, the ARF named the winners of the 2013 ARF David Ogilvy Awards, which honor the most innovative, successful and promising advertising research programs: **Procter & Gamble**'s "Thank You Mom" campaign, Grand Ogilvy Award; **ConAgra Foods**' Slim Jim "Man Medicine" campaign, Ogilvy Grand Award for Research Achievement; and **The Clorox Company**'s "Stronger Stand Against Waste" campaign for Glad, Research Innovation Award.

■ Oslo, Norway, research software company **Confirmit** has announced the winners of its 2013 Achievement in Customer Excellence Awards, which recognize companies with outstanding feedback programs and commitment to increased customer, employee and partner satisfaction. A full list of the 45 winners is available at www.confirmit.com/ace-awards.

■ **IModerate Research Technologies**, Denver, and Washington, D.C., data services company **Catalist** won the 2013 Pollie Award from the American Association of Political Consultants, McLean, Va., for best use of technology during the 2012 campaign for their Voter Insider product.

■ **Andrea Schrager** of Secaucus, N.J., research company Meadowlands Consumer Center Inc. has been named one of New Jersey's Best 50 Women in Business by ***NJBIZ***. The award honors New Jersey's most dynamic women in business who have been making headlines in their field.

New accounts/projects

■ Paris research company **Ipsos** has been awarded an additional year's contract to track Italian radio audiences using MediaCell, its mobile radio audience measurement system.

■ **The National Association of Pension Funds**, London, has selected the London division of Princeton, N.J., research company **ORC International** to provide a benchmarking portal reporting tool for its annual pensions survey.

■ The city of **Surrey, B.C.**, has selected Vancouver, B.C., research company **Vision Critical** to create an online forum open to Surrey residents and business owners. The forum is designed to encourage public engagement and more diversity of opinion on city issues.

■ Atlanta research company **CMI** has adopted Westport, Conn., research company **Imperium**'s suite of security, verification and data quality options.

■ U.K. data processing bureau **Framework** has adopted the Beacon survey software platform for its survey programming and reporting needs from **Decrypt**, the London branch of Fresno, Calif., research company Decipher Inc.

New companies/new divisions/relocations/expansions

■ New York research company **GroupM** has launched **GroupM Multicultural**. The division will be led by Gonzalo Del Fa.

■ **Theory House**, a Charlotte, N.C., shopper marketing and advertising agency, has opened for business. Research will be among its offerings. Theory House is online at www.theoryhouse.com.

■ Montreal research company **Voxco** has launched **Semeon Analytics**, a Montreal social media monitoring and analytics company. The company is online at www.semeon.com.

■ **Q Research Software**, Sydney, Australia, has opened an office in New York at 116 West 23rd St., 5th Floor. Steven Kawalek will lead the operation.

■ Wellington, New Zealand, research company **Information Tools Ltd.** has relocated its London office to Soho Square.

Research company earnings/financial news

■ **The Nielsen Company**, New York, reported financial results for the quarter ended March 31, 2013. Revenues increased 3 percent to $1,376 million. Net income grew 36 percent to $34 million.

■ **Ipsos**, Paris, reported first-quarter 2013 revenue of 359.6 million euros, a 5.3 percent decrease from the same period in 2012.

■ **EasyInsites**, Surrey, U.K., reported first-quarter 2013 revenue growth of over 40 percent compared to 2012.

■ **RDA Group**, Bloomfield Hills, Mich., announced 2012 revenue of $19.1 million, up 9 percent over 2011.

■ **Forrester Research Inc.**, Cambridge, Mass., announced its intentions to repurchase up to $130 million of its common stock at $32-$36 per share.

■ **WorldOne**, New York, has secured $35 million in funding commitments from Deerfield Management Company.

CALENDAR OF EVENTS

••• can't-miss activities

featured

SSI will hold a complimentary Webinar, themed "Old Dog, New Tricks: How CATI is relevant in the online research age," on June 19 at 11 a.m. CDT. Aren Sorensen will present. For more information and to register visit https://quirks.webex.com/quirks/onstage/g.php?t=a&d=668230703.

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

The Advertising Research Foundation will hold its annual conference, themed "Audience Measurement 8.0," on June 10-11 at the Marriott Marquis in New York. For more information visit www.thearf.org/am-8.

Strategy Institute will hold a conference, titled "Customer Experience Strategies Summit West," on June 18-19 at the Rosewood Hotel Georgia in Vancouver, B.C. For more information visit www.customerexperiencewest.com.

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.

IIR will hold a conference, themed "Shopper Insights in Action," on July 15-17 at the Swissotel Chicago. For more information visit www.shopperinsightsevent.com.

The Merlien Institute will hold a conference, themed "Market Research in the Mobile World North America," on July 16-18 at the Minneapolis Marriott West in Minneapolis. For more information visit www.mrmw.net.

The International Quality and Productivity Center will hold its annual customer analytics and intelligence conference, themed "Getting Beyond 'Big Data:' Customer Intelligence from Satisfaction to Sales," on July 22-24 in San Diego. For more information visit www.customeranalyticsevent.com.

The Southwest Chapter of the Marketing Research Association will hold its 2013 educational forum on August 8-9 at The Curtis Hotel in Denver. For more information visit www.swmra.org/events/ef2013.

Worldwide Business Research will hold a conference, themed "Next Generation Customer Experience Canada," on September 17-18 in Toronto. For more information visit www.the-customer.ca.

The International Quality and Productivity Center will hold a conference, themed "Big Data Exchange," on September 22-24 in San Francisco. For more information visit www.bigdataexchange-usa.com.

ESOMAR will hold its annual congress on September 22-25 in Istanbul, Turkey. For more information visit www.esomar.org.

The Mystery Shopping Providers Association will hold its annual conference on September 24-26 at the Marriott Riverwalk in San Antonio. For more information visit www.mysteryshop.org/events.

Richmond Events will host a conference, themed "The Market Insight Forum," on October 3 at The Harvard Club in New York. For more information visit www.us.marketinsightforum.com.

The Council of American Survey Research Organizations will hold its annual conference on October 7-10 at the Four Seasons Westlake Village in Los Angeles. For more information visit www.casro.org.

The Merlien Institute will hold a conference, themed "Market Research in the Mobile World Europe," on October 8-10 in London. For more information visit www.mrmw.net.

Sawtooth Software will hold its annual research conference on October 15-18 in Dana Point, Calif. For more information visit www.sawtoothsoftware.com.

The Marketing Research Association, **Quirk's** and the **Market Research Executive Board** will host the Corporate Researchers Conference on October 16-18 at the Fairmont Dallas. For more information visit http://crc.marketingresearch.org.

The Qualitative Research Consultants Association will hold its annual conference, themed "Mission: Exploration," on October 16-18 at the Hyatt Regency Mission Bay in San Diego. For more information visit www.qrca.org.

The Pharmaceutical Marketing Research Group will hold its annual meeting of The PMRG Institute on October 20-22 at the Hyatt Regency Jersey City in Jersey City, N.J. For more information visit www.pmrg.org.

IIR will hold its annual conference, "The Market Research Event 2013," on October 21-23 at the Gaylord Opryland Hotel in Nashville, Tenn. For more information visit www.themarketresearchevent.com.

Research & Results will hold its annual conference on October 23-24 at the MOC Convention Center in Munich, Germany. For more information visit www.research-results.com.

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

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BEFORE YOU GO ••• issue highlights and parting words

••• cover-to-cover

Facts, figures and insights from this month's issue

page 14 Sixty-one percent of mobile users say that they use their smartphones for all functions of their daily life, up 34 percent from a year ago.

page 38 Getting such a positive response from customers from such negative news is a testament to the vast potential of customer communication and education.

page 61 We definitely need an industry-wide focus on educating the population on what we do, why we do it and why we love it.

Plan now for the CRC

The 2013 Corporate Researchers Conference (CRC) is coming to The Fairmont Dallas on October 16-18! The CRC is the only peer-to-peer event produced by and for corporate researchers so the focus is on what you do and how you can do it better. The unique culture and experience of the CRC is the result of a sincere commitment to corporate researchers and their success. The CRC is co-sponsored by Quirk's, the Marketing Research Association and Corporate Executive Board. Each organization works solely to advance the marketing research profession – MR is all we ever do! To learn more and to register, visit crc.marketingresesearch.org. We hope to see you there!

Our pledge to readers

At Quirk's Media we sift, filter, highlight and verify the information we provide to our readers to provide a clear and comprehensive understanding of the techniques and practices of the research industry. None of this would mean anything if we didn't remain a neutral and unbiased source of information. That is why no owner, board member or employee of Quirk's is allowed to sit on the board or own direct shares in a research company. Likewise, employees and owners are prohibited from consulting for or being employed by a research firm and we never hire research firms, as doing so could give the appearance of supporting one firm over another. Additionally, Quirk's never sells editorial space, nor is the publishing of an article contingent upon purchasing advertising. We choose content based on its merit alone. Anything else would undermine our credibility with you, our readers.

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