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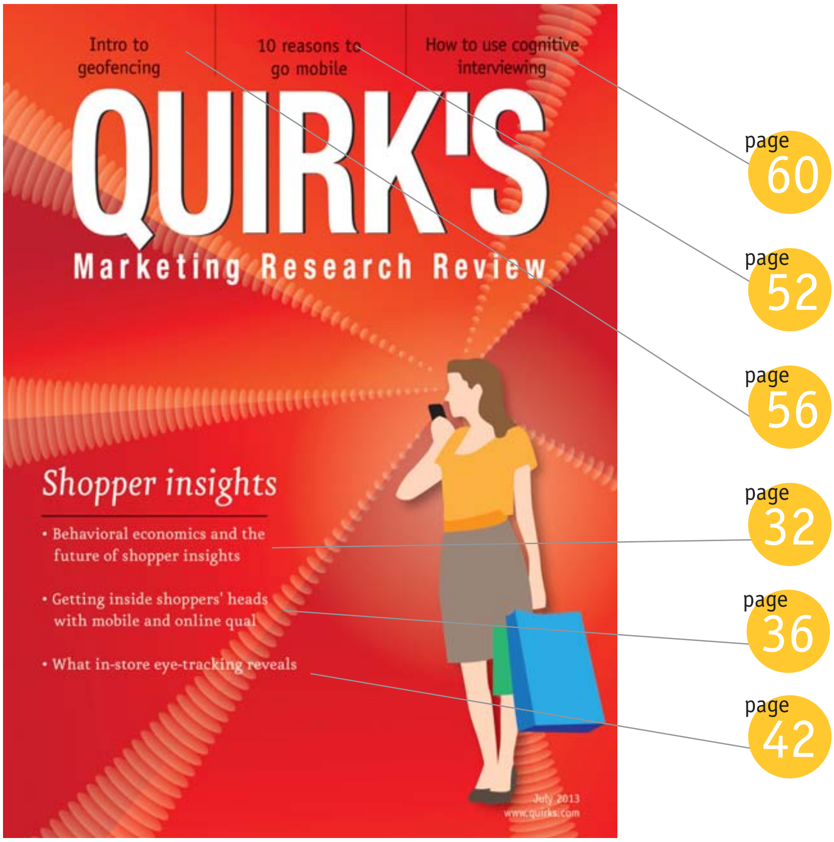

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CLICK WITH QUIRK'S

••• online, e-newsletter and blog highlights

••• directories

It's like Yelp for corporate researchers!

Quirk's is pleased to announce that it has now added commenting to all online directory listings for the purpose of allowing researchers to share recommendations on vendors across hundreds of product, service and facility categories. This includes firms specializing in everything from advertising research to focus group facilities and software platforms.

In an informal way, supplier recommendations are already happening in-person, on LinkedIn and through word-of-mouth. Quirk's is simply bringing the feedback into the open and tying it into a singular destination (our directories) to connect members of the research community.

The recommendation module is intuitive and easy to use and allows you to sign in using your existing accounts such as Facebook or Twitter.

Maybe you've worked with a fantastic supplier and want to provide a referral. Perhaps your experience wasn't noteworthy and you want to talk about that too. That's okay. But in order to ensure authenticity, all posts will be reviewed and no anonymous posts will be allowed. Research companies will have the ability to respond to any post – so please keep your comments constructive and civil!

While some may bristle at the idea of sharing this type of subjective information, our goal is not to facilitate the public berating of a company for less-than-desirable service. Rather, the aim is to help improve the overall effectiveness of the research products and services you purchase by providing a vehicle for rewarding your valued vendors, improving the ones that came up short and gaining insight into companies you may be considering for future projects.

To view and comment on directory listings go to www.quirks.com/directory.

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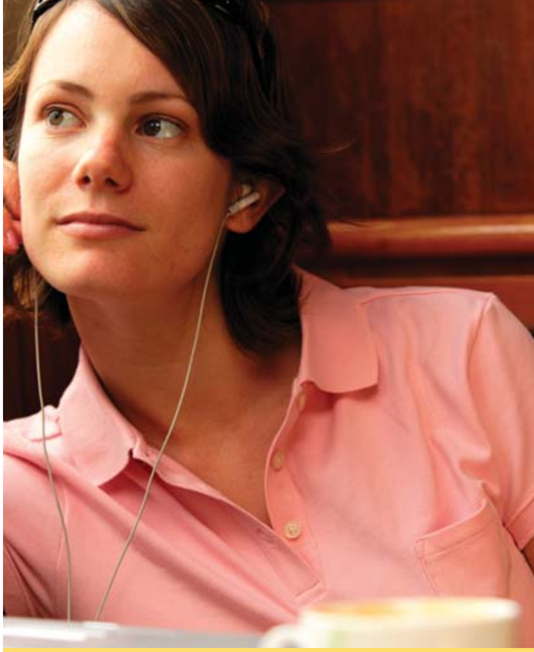

••• consumer research

Study shows the impact of positive brand experiences

When it comes to brand-related chatter among consumers, a study has found that the most powerful conversations are started by a positive brand experience, both in terms of quantity and quality. Topline findings show that over 50 percent of conversations triggered by an in-person experience spark action to pass along and purchase.

For the study, Experience-Driven Word of Mouth: The Key to Powerful Social Marketing, Keller Fay Group, Chicago, looked at the beverage; household product; media and entertainment; technology; and food and dining categories. Results from over 30,000 consumer interviews among consumers ages 13-69, showed:

Experience-driven earned media (earned media is publicity gained via non-advertising promotional efforts) sparks the most action, especially when it references the brand's media/marketing: 55 percent rate it highly likely to spur them to pass it along, eight points (17 percent) higher than media/marketing word-of-mouth (WOM) alone; 45 percent rate it highly likely to spur them to seek more info, eight points (22 percent) higher than media/marketing WOM alone; 56 percent rate it highly likely to spur them to purchase, 10 points (22 percent) higher than media/marketing WOM alone.

After "need," "good experience" sparks the most earned media (17 percent and 15 percent, respectively). Ads spark just 5 percent and social media sparks just 3 percent.

Experience-driven earned media is the most credible: 63 percent rate it highly credible – 10 points (19 percent) higher than media/marketing WOM, at only 53 percent.

Over half (51 percent) of experience-driven earned media contains strong recommendation to buy/try – 11 points (28 percent) more than media/marketing WOM alone.

One fast-growing marketer is all over this magic combination. SodaStream, a maker of at-home soda-making products, has been using word-of-mouth driven by an in-person experience. "We've built our business on word-of-mouth and turbocharged our campaigns by adding the in-person experience," says Kristin Harp, SodaStream U.S.A's marketing manager. "We have seen that putting our soda makers and flavors into the homes and hands – and the social networks – of consumers leads to powerful advocacy coupled with sizable lifts in awareness as well as purchase intent."

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••• media research

Meet the media omnivores

According to New York-based Nielsen's U.S. Entertainment Consumer Report, consumers in households earning an average annual income of $66,000 account for more than 70 percent of spending on entertainment – things like books, video-on-demand and music. These high-entertainment spenders not only have more discretionary income than low or moderate spenders, they also participate in more entertainment activities. This group is also more likely to be female, ethnically diverse and have young children in their household.

High spenders who enjoy an array of activities are ultimately limited in how much time they dedicate to each. Thus, content providers and advertisers have a slightly larger window of opportunity to engage with moderate and low spenders.

So what's the best content for capturing each group's attention? All three segments spend the most time each week playing video games and listening to music, with low spenders clocking the most time, at nearly nine hours. Low spenders also spend the most time perusing print books, magazines or newspapers (5.3 hours per week, on average) and watching mobile video (3.4 hours), while moderate spenders find more time to read content online (4.8 hours) and watch DVDs/Blu-rays (4.7 hours) and video-on-demand (4.6 hours).

By Joseph Rydholm, Quirk's Editor

Quartz obsessions worth obsessing about

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Joe Rydholm can be reached at joe@quirks.com

One of the many online news sources I frequent is Quartz, "a digitally native news outlet" as they refer to themselves. The editors organize their reporting around what they call their "obsessions," the forces and factors that they see shaping the global economy. They devote a special section of their site (www.qz.com) to explaining them, ostensibly to let readers know the prisms through which their work should be viewed.

They periodically update the list and the most recent update, from late May, got me to thinking about what effect(s) some of the forces could have on the marketing and marketing research world. (The Quartz commentary is shown in italics.)

The mobile Web

Between ever-cheaper smartphones and "dumbphones" which cost as little as $10, plus the dawn of banking, messaging and social networking services that can run on any device, the possibility that everyone on Earth could be connected is more real than ever. . . . How will new form factors, like watches and face-based computers, change our experience of the Web?

Possible impacts on MR: It's obviously a ways down the road, but what could Google Glass or things like the Pebble watch mean for marketing research? Is "wearable computing" just an extension of the Internet or a whole new form of interaction for respondents and researchers or consumers and companies?

Digital money

... the Web, mobile phones and new sales terminals are making possible payment mechanisms that improve on credit card transactions or do away with them all together. That's a lucrative business, which is why the payments sector has seen some of the highest pre-IPO valuations of any in Silicon Valley. Meanwhile, the rise of bitcoin and its imitators means that a stateless virtual currency could become a serious intermediary between other currencies or payment method in its own right. And in emerging markets, payments via mobile phone are already turning telecoms companies into banks.

Possible impacts on MR: Could the accruing of several micropayments over time hold more appeal for survey respondents than entries in sweepstakes that "no one ever wins"? And do those payments (micro or otherwise) have to be in monetary form? Will, as Quartz terms it, a "stateless virtual currency" take over as a preferred form of payment for participation in research?

China's transition

To keep growing, China must now get its 1.35 billion people to consume more, while simultaneously righting global trade imbalances, ramping up its service sector and managing the debt it has racked up. Under its latest set of leaders, how will China cope with these challenges to its economy – and how will its successes and failures affect the global economy too?

Possible impacts on MR: Hmm . . . 1.35 billion people, you say? That's a lot of potential research respondents. How do we get them familiar with and positively predisposed to the marketing research process? And beyond that, how do we begin understanding the psychology behind the act of consumption in a country that only a handful of decades ago actively discouraged it?

How we buy

As the global middle class keeps swelling, consumer spending on everything from corn to cars to air conditioners is hitting new highs and moving online and doing so especially fast in emerging economies. . . . What sorts of companies and products are meeting these changing demands? How is spending in developed economies shifting? What is the future of physical retail stores? Is the context between e-commerce operations and brick-and-mortar stores really a zero-sum war? How will spending shape global trade and economics and how do shifting political tides affect spending?

Possible impacts on MR: This one makes your head spin. I think the Quartz list of questions is sufficiently mind-boggling on its own without requiring more input from here!

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IN FOCUS

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

// Survey Monitor

••• automotive

A love affair on wheels

MAACO survey elicited fond car memories

A new consumer survey released by Charlotte, N.C., auto body repair chain MAACO reveals a sentiment contrary to the perception of our throw-away culture: Americans don't have to, but want to, keep their cars longer.

America has always been "car country," and the newest, latest and greatest autos forever seem to generate buzz and move units. But is this perception only skin deep? Digging a bit further, MAACO found that 65 percent of Americans had a favorite car and while close to 50 percent didn't have it anymore, 75 percent wished they could have it back. (The survey was conducted by Los Angeles-based Impulse Research for MAACO during the week of April 1, 2013.)

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According to the survey, memories of good times in those beloved vehicles have not faded. From one respondent who fondly remembered his BMW as an "awesome Chick-gitter [sic]. Got my wife with it!" to the owner of the sports car remembered as the "fastest darn thing on the road" that was "great for hiway [sic] driving" and "clocked at a legit 150 mph by Montana State Police," people relished the chance to tell about the romance they once had with their favorite ride.

The survey also revealed several additional takeaways:

I've Got the Blues and Couldn't Feel Better!: Maybe it's time to rethink the connection between malaise and the color blue. Of the respondents describing themselves as having "happy" dispositions, 23 percent wish they had a blue car. Only 13 percent actually own a blue car, with most shiny happy people pushing shiny happy gray/silver whips.

You're So Vain: More men (74 percent) than women (59 percent) say their car reflects their sense of style or their personality.

Coast-to-Coast: The West Coast may be perceived as the more shallow and materialistic coast but more people in the Northeast (37 percent) think their car reflects their sense of style than those in the West (28 percent).

Red State, Blue State: Oddly enough, when asked what color car they wished they had, the highest percentage of conservatives (26 percent) preferred a blue car, while 19 percent of liberals preferred a red car. (The researchers assume conservatives are comfortable driving blue cars in red states and that liberals are comfortable driving red cars in blue states. They didn't ask.)

Keep on Running: The average age of the American car is 11 years but according to the survey, almost 50 percent of respondents planned to drive their current cars into the ground and will likely keep their car "as long as it keeps running." In addition, 56 percent said that they planned on keeping their current car longer than they kept their last car.

It's Not the Economy, Stupid: Oddly enough, people were evenly split when asked if the current economy was forcing them to hold onto their vehicle longer, with 44 percent responding yes and 45 responding no.

You're Needed in Makeup: Even more telling, 75 percent of respondents said they would likely keep their car longer if they could give it a "makeover" (body work and paint). This seems to gain support from the findings of a recently-released AAA survey which implied that the improvement in car quality lets people keep cars longer.

The Thrill Is Gone (But Not for Good): Of those who said they didn't like or "hated" their car, 58 percent said it was

because it needed body work or paint or because they hated the color.

Pretty in Pink (If You Can Find It!): Almost no respondents wish they had a pink car, except for a few outliers (3 percent) on the West Coast. Surprising? Maybe, but just know the market exists – small though it may be! No respondents owned pink cars, it is worth noting.

Motor Memories: Asked about the most memorable experience they ever had in their car, some said it was bringing their child home from the hospital (10 percent), taking their car to college (7 percent) or having their first date or driving it on their honeymoon (7 percent). There were a few rather more "interesting" responses and certainly a theme emerged: "Don't care to kiss and tell" and "I could, but I don't think that the statute of limitations has expired yet," are the ones fit to print. But there were some other great moments as well including: "It was the car I rode home in after my tour in Iraq was over." "All of my major road trips with my future wife were in this car" and "Driving a stick for the first time was memorable. It made me feel like a race car driver."

••• b2b research

Taking it elsewhere

CEO poll calls out best, worst states for business

For the ninth year in a row, CEOs rate Texas as the No. 1 state in which to do business, according to *Chief Executive* magazine's annual Best & Worst States Survey. Florida, North Carolina, Tennessee and Indiana also made the top five. The states rated worst for business are California, New York, Illinois, Massachusetts and New Jersey.

The Best & Worst States Survey measures the sentiments of CEOs on a range of issues, including regulations, tax policies, workforce quality, educational resources, quality of living and infrastructure. For the 2013 survey, 736 CEOs from across the country evaluated the states between January 16 and February 14, 2013.

Ohio was the biggest gainer in this year's survey, rising 13 spots from #35 to #22. The other biggest gainers were: Minnesota (up six spots), Alabama (five), Arizona (four) and Kansas (four).

The biggest loser was Delaware, which dropped 13 spots to #27. The other biggest losers were: Mississippi (down eight spots), Missouri (seven), Kentucky (four) and Wyoming (four).

CEOs say California's poor ranking is the result of a perceived hostility to business, high state taxes and onerous regulations, all of which drive investment, companies and jobs to other states. According to the California Manufacturers and Technology Association, California accounts for 12.6 percent of total U.S. GDP but only has a 2.2 percent share of investments in new and expanding manufacturing sites.

"When you investigate acquiring businesses in some of the states rated poorly for business conditions, the anecdotes all wind up being true," says Kevin Hawkesworth, president and CEO of Florida-based Shaw Development. "The horror stories about these states are real."

"California, Illinois and New York are simply awful states to operate facilities or employ people," according to another CEO. "We will do almost anything possible to minimize our exposure to these anti-business environments."

"Thank you, California!" responded one Texas-based CEO facetiously. "Keep applying pressure on your job creators and we will keep welcoming their moves to Texas."

A common theme among CEOs is the burden of constantly-changing regulations. "Business is too hard without dealing with piles of regulations that are constantly changing," says Rick Waechter, CEO of Boston Magazine. "I believe there have to be controls but keep them simple and straightforward – and most importantly, don't make it a moving target."

"The playbook for successful states boils down to three simple moves: engage in real dialogue with business leaders, adapt policies to create an attractive environment and effectively communicate your story to real job creators," says Marshall Cooper, CEO of *Chief Executive* magazine and chiefexecutive.net. "This year's rankings prove that smart policies result in increased investments, jobs and greater overall economic activity." www.chiefexecutive.net

••• loyalty research

You've earned it

Maritz Loyalty Marketing Survey reveals top-rated loyalty programs

Chase Ultimate Rewards earned an 84 percent overall satisfaction rate in the financial services category, according to results from a study of U.S. consumer loyalty programs conducted by Maritz Loyalty Marketing, Toronto.

In addition to financial services, the study looked at the motivators of brand loyalty across five other industries. Here are the top-rated firms/programs: entertainment – Carmike Cinemas

Rewards (79 percent); retail programs – Kohl's Rewards (73 percent); hospitality/hotel – IHG Priority Club Rewards (67 percent); grocery – Kroger Rewards (83 percent); airlines – Southwest Airlines Rapid Rewards (58 percent).

The Maritz Loyalty Report results suggest that 71 percent of members would join more loyalty programs, even though the average member is already enrolled in 7.4 programs. The report also found that members are only actively participating in 63 percent of the programs in which they are enrolled.

"Our study revealed that 47 percent of members have stopped participating in one or more programs in the past year. This number is disconcerting for program operators yet of even greater concern is that only 7 percent of these defecting customers actively defect – meaning, they actually formally request to leave a loyalty program," says Scott Robinson, senior director of loyalty consulting for Maritz Loyalty Marketing. "Given the high percentage of passive defection, it is paramount that loyalty marketers proactively identify the early warning signs of disengaged members."

Overall, 65 percent of members are satisfied with the loyalty programs in which they participate. The Maritz Loyalty Report also includes customer ratings on more than 35 program attributes. Some of those attributes, also considered key drivers of satisfaction, include:

Program values – pride of membership, program uniqueness, meeting customer needs, etc.

Program mechanics – ability to earn and redeem points, quality of rewards, etc.

Ability to interact with programs – Web site, mobile, customer support, etc.

Program innovation – program freshness, access to exclusive events, personalized experiences, etc.

Communications from programs – means, relevance and frequency of communications, etc.

Top programs rate similarly on many of these attributes and the top program tends to discern itself from next-best programs by a higher rating on only one key attribute. In some program categories, such as retail loyalty and airline loyalty, top-rated programs and next-highest rated programs score similarly on all attributes. In these competitive categories, the attribute on which the highest-rated program discerns itself from next-highest rated programs is a secondary and differentiating driver.

"The implication for program operators," says Robinson, "is that in order to be competitive, especially in categories with many largely undifferentiated programs, it is essential for programs to deliver effectively on both the key drivers of satisfaction and also the secondary drivers of satisfaction."

Surveying more than 6,000 loyalty program members, the Maritz Loyalty Report: U.S. Edition examines customer trends and sentiments related to all facets of loyalty programs, including behaviors, communications, privacy, personal values and satisfaction. www.maritzloyaltymarketing.com/loyalty-report

••• travel

Trip on this

Studies quantify the impact of travel expenditures on U.S. economy

A report from Roger Dow, president of the U.S. Travel Association, on how tourism benefits the U.S. economy shows that direct travel spending in the United States totaled $855 billion in 2012, generating $2 trillion in economic output and more than $129 billion in tax revenue. Travel directly employed 7.7 million Americans and was among the top 10 employers in 48 U.S. states and the District of Columbia.

The most lucrative segment of this sector is "long-haul" or overseas travel, says the report. The overseas traveler stays longer and spends more, for an average of 18 nights and nearly $4,500 per visitor per trip. Millions of global citizens are now traveling abroad and for every 33 overseas travelers who decide to visit the U.S. an additional American job is created.

Since 2010 the travel industry has helped lead the economic recovery by restoring 85 percent of the jobs lost during the downturn compared to just 69 percent of the rest of the economy. Today, travel is the nation's No. 1 service export. In 2012, travel exports totaled $168.1 billion (including traveler spending and international passenger fare payments to U.S. carriers), yielding a record $50 billion travel trade surplus.

While "travel" frequently connotes tourism, acknowledges the report, business travel accounts for nearly a third of all travel spending. In 2012, domestic business travel generated an estimated $225 billion in direct spending, 5 percent higher than the previous year and above the all-time high reached in 2007. Business travel directly created nearly two million American jobs. Totaling the deals done, products sold and opportunities created at industry conferences and trade shows that also employed scores of hospitality workers, the total number of jobs supported was 3.7 million.

The report says that U.S. business travel is responsible for $246 billion in spending and 2.3 million American jobs; $100 billion of this spending and nearly one million American jobs are linked directly to meetings and events.

An Oxford Economics study, recently released, shows that every dollar invested in business travel generates an average $9.50 in increased revenue and $2.90 in new profits. In addition, the study found that companies that invested the most in business travel during the recession have grown faster than those that cut back on travel. Data from 2007-2011 for 61 industries shows sectors that spent the most on business travel throughout the recession posted higher profit growth.

Other findings include:

- Curbing business travel has a negative impact on corporate profits. The average U.S. business would forfeit 15 percent of its profits in the first year of eliminating business travel. It would take over three years for profits to recover. (Business travel includes sales trips, meetings, conventions and incentive trips.)

- Executives cited customer meetings as having the greatest returns, in the range of $15-$19.99 per dollar invested. Executives identified the average return on conference and trade show participation to be in the range of $4-$5.99 per dollar invested.

- Sixty percent found that virtual meetings are less effective for meetings with prospects than in-person meetings; 42 percent of executives stated that they would lose their customers without face-to-face meetings.

- Business travelers reported that they are twice as likely to convert prospects into customers with an in-person meeting than without one.

- Both executives and business travelers estimate that 28 percent of current business would be lost without in-person meetings. Seventy-four percent reported that in-person meetings with clients deliver a high impact on customer retention.

- Both executives and business travelers estimate that roughly 40 percent of their prospective customers are converted to new customers with an in-person meeting compared to 16 percent without such a meeting.

- More than half of business travelers stated that 5 to 20 percent of their company's new customers were the result of trade-show participation.

- 85 percent of corporate executives perceive Web meetings and teleconferences to be less effective than in-person meetings with prospective customers and 63 percent believe virtual meetings are less effective than in-person meetings with current customers.

www.ustravel.org

••• financial services

An discreditable performance

Consumers come up short on credit-score savvy

As a group, consumers are woefully ignorant when it comes to credit-score knowledge, according to a study from Stamford, Conn., credit-scoring firm VantageScore Solutions and the Consumer Federation of America (CFA), a nonprofit association of nearly 300 consumer groups. Now in its third year, this iteration of the annual study of consumer knowledge of credit scoring is based on an 18-question survey administered by Opinion Research Corp., Princeton, N.J., to more than 1,000 representative American consumers.

The results show large percentages of consumers incorrectly answered wide-ranging questions about credit scores and their impact. For example, many survey respondents do not know that credit card issuers (38 percent) and mortgage lenders (40 percent) use credit scores in decisions about credit availability and pricing. Two-fifths incorrectly believe that personal characteristics such as age (43 percent) and marital status (40 percent) are used in calculating credit scores.

This year's survey also included a question related to co-signing for a student loan. The survey found between one-third and two-fifths do not know that the credit scores of student loan co-signers are affected by that loan – improving if payments are made on time (38 percent) and declining with one late payment (31 percent).

"The student loan market has grown enormously over the past few years. Student loans are now the second largest asset class in the credit industry, trailing only the mortgage industry," says Barrett Burns, president and CEO of VantageScore Solutions. "Unfortunately, student loan defaults are also increasing. We need targeted education to ensure both graduating students and co-signers of their loans fully understand their obligations and the repercussions of missed payments."

As part of their educational initiative, VantageScore Solutions and CFA launched www.creditscorequiz.org, a consumer-focused site that mimics the survey. It lets consumers test their credit scoring knowledge and provides correct answers for each question as they progress through the quiz. The site is completely free and neither displays any advertising nor collects any personal data. Useful resources and real-time nationwide results are provided. Both the online quiz and a companion brochure are also available in Spanish at www.creditscorequiz.org/espanol.

www.consumerfed.org

IN FOCUS

Product and Service Update

••• social media research

Marketers, study up

Online course teaches social media skills

The University of Georgia Center of Continuing Education is offering a new online certificate course entitled Using Social Media to Build Business. The course is designed to help businesses build loyalty and trust. "Today's new 'social consumers' are more demanding and increasingly connected in their buying decisions. Businesses need sound social media strategies integrated with their other communications vehicles," said Pam Bracken, department head of special projects and curriculum development at the Georgia Center, in a press release. "We saw this need but found that few universities offer an online certificate course in social media marketing for business professionals. The online courses available were either quite expensive or open only to students enrolled in degree programs."

In response, Bracken said, the Georgia Center worked with the Grady College of Journalism and Mass Communication to develop a new course. Five faculty experts in the department of advertising and public relations created the course: Karen King, Kaye D. Sweetser, Joe Phua, Karen Russell and Jay Hamilton. The 44-hour course costs $1,999 and classes can be started anytime.

www.ugagetsmart.com

••• data analysis

Toluna enhances TolunaAnalytics

Improvements target trackers, sharing

Wilton, Conn., research firm Toluna has issued a number of feature enhancements to TolunaAnalytics, its Web-based data reporting, analysis and visualization tool. Enhancements include: availability for continuous and multi-wave trackers; analysis of integrated multicounty tracker studies by reviewing data by country or across all countries and by language; sharing online reports with collaborators in real-time – filtered by product, region, location and more – wave on wave; instantly see trends in standard time slices – daily, weekly, monthly, quarterly – or create custom time slices; overlay custom weights across datasets to make representative of desired population; run significance tests on crosstabs and create derived variables without needing to resort to code or syntax.

TolunaAnalytics can expedite data analysis, as data are accessible within a single user-interface within moments of project launch. Users can weight data, create segments and conduct significance testing, as well as their own crosstabulations and personalized PowerPoint presentations. TolunaAnalytics is compatible with all browser types and devices, whether they are computers, smartphones or tablet PCs.

www.toluna-group.com

••• television research

Linking to thinking

TiVo tool allows psychographic targeting

TiVo Research and Analytics Inc., a New York provider of single-source viewing and purchase data for advertisers and networks, has expanded its advertising optimization solution with Power||Watch, a panel of 48,000 TiVo households that have affirmatively opted-in to having their personally-identifiable viewing information collected and responding to monthly online surveys. Advertisers will now be able to look at the TV-tuning behaviors of households based on attitudes and other behavioral characteristics such as intent to purchase a new vehicle, types of favorite movie genres, political affiliation and travel ambitions.

To demonstrate the capability of Power||Watch for movie studios, TRA compared television series that index high for panelists who went to see Oscar-nominated movies *The Hobbit*, *Les Miserables* and *Zero Dark Thirty* in theaters. When they are not exploring Middle Earth, *Hobbit* moviegoers spend their time watching animated sitcoms on Fox such as *Bob's Burgers* and *The Simpsons* as well as CW's

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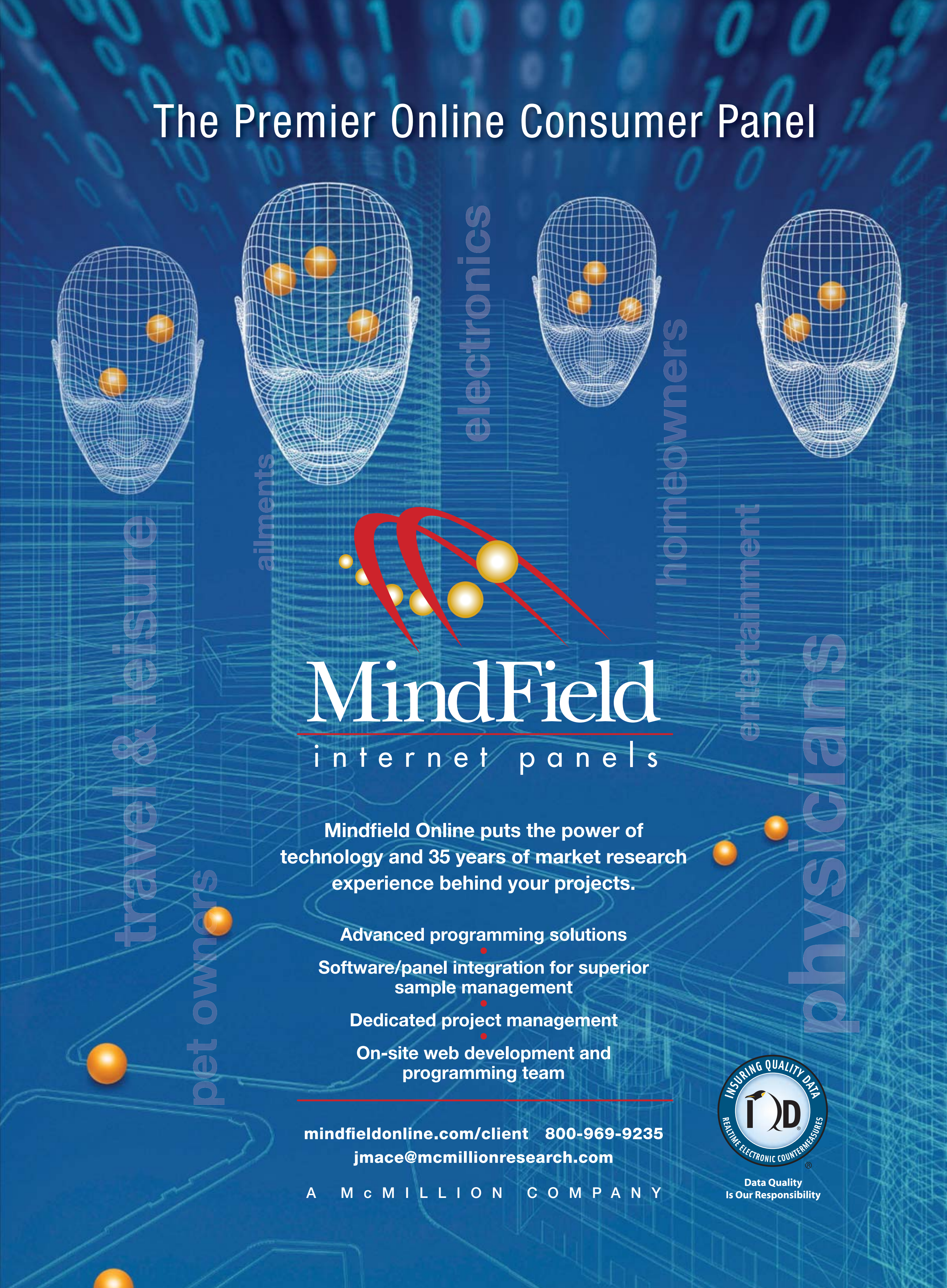

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Is Our Responsibility

Arrow and ABC's *Once Upon A Time*. *Les Miserables* patrons prefer *Glee* on Fox as well as figure skating on NBC, The Golden Globe Awards and ABC's *The Bachelor*. *Zero Dark Thirty* attendees can be found watching CW's *Nikita*, NFL Football and the Kevin Bacon thriller *The Following* on Fox.

TRA has preloaded the following psychographic targeting attributes that are available for use: auto plan to purchase; moviegoer – plan to watch [title] in theater; moviegoer – have watched [title] in theater; moviegoer – movie genre preference; over-the-top video consumption and preference (Netflix, Hulu, Amazon, etc.); number of TVs and DVRs in household.
www.traglobal.com

••• mobile research

You are there

Civicom app captures consumers' in-store thoughts

Civicom Marketing Research Services, Greenwich, Conn., has launched a mobile app to support its dial-in technology for mobile marketing research studies. Consumers participating in research activities use the app to dial in and record their thoughts while going about their shopping experience. Within 10 minutes of a recording, researchers and their clients can go to their Civicom online account and click on the recordings to hear what people are deciding to do at the point of purchase.
www.civi.com/marketingresearch

••• media research

Who's watching online?

New measurement helps ad buys across TV, AOL digital video

AOL, New York, announced a collaboration with Nielsen to measure the audience viewing AOL's library of over 620,000 premium videos. The custom AOL Video Reach (AVR), powered by Nielsen Online Campaign Ratings, will express audience measurement in the language of TV, enabling comparisons between the audience of AOL's original programming and curated premium partner content to TV viewership.

While the online industry has traditionally been able to measure the number of video streams, it has been difficult to accurately measure audiences at a meaningfully granular level. Meanwhile, brands are looking to reflect consumers' multiscreen, screen-agnostic approach to viewing programming and make online content an integral part of their video buys.

AOL is also participating in the pilot program for Nielsen Digital Program Ratings. Nielsen Digital Program Ratings will measure audiences for TV content viewed online, delivering overnight data, including unique audience and reach by age and gender.
www. corp.aol.com

••• telephone research

Calling for improvements

Confirmit and Sytel collaborate for better CATI

Oslo, Norway-based research software firm Confirmit has integrated Sytel's predictive dialer with the Confirmit Horizons CATI solution. Sytel Limited, a U.K.-based provider of IP contact center solutions, has used the Open Dialer API in Confirmit Horizons to develop an interface with Confirmit. The solution is designed to maximize interviewer productivity when deploying Confirmit surveys to contact-center agents within both global and smaller-scale customers. It is also intended to ensure regulatory compliance as well as provide integrated voice recording and access to other applications such as live monitoring.
www.confirmit.com

••• television research

This is only a test

Nets sign on for online video pilot program

Nielsen, New York, announced a pilot program for Nielsen Digital Program Ratings which will measure audiences for TV content viewed online. A+E, ABC, AOL, CBS, The CW, Discovery Communications, FOX, NBC and Univision have all signed on to participate in this test, which began in May and runs through July. The initial focus of the pilot will be measurement of TV content viewed online, with additional content types and devices to be supported in future releases. The pilot program will be used to fine-tune Nielsen Digital Program Ratings prior to commercial launch. www.nielsen.com

●●● mobile research

Free app from ChatterMob

i-centric MR tool

Boston-based ChatterMob has launched a free mobile app of its market research tool that allows consumers to win prizes for answering survey questions. The app is currently available for the iPhone 3GS, iPhone 4, iPhone 5, iPod touch (3rd and 4th generation) and iPad. The ChatterMob app allows users to log in for free using Facebook and skip questions they don't want to answer. The app also features a time-saving single swipe that quickly brings users to the next questions. www.chattermob.com

●●● crowdsourcing

Work with me

BuzzBack unveils collaborative qualitative online forum

New York research firm BuzzBack has unveiled a new online social forum that allows marketers to solve brand challenges by connecting, interacting and iterating with consumers via short-term, collaborative communities. Geared for consumer deep dives, exploration, concept building and co-creation, BuzzBack Hive integrates BuzzBack's tools such as eCollage and Concept Focus.

BuzzBack Hive introduces pop-up qualitative communities within a familiar social media experience that enable consumers to communicate through blogs, idea-building, photo-sharing, time-phased exercises, short polls and mobile exercises.

Hive capitalizes on the consumer propensity to readily share opinions and experiences (including pictures and video) in a social context. With the opportunity to connect and connect again, companies gain understanding about consumer behavior through iterative qualitative exploration. Because Hive fosters collaboration and co-creation,

companies develop concepts based on shared experiences and idea-building over time. Through integrated innovative visual and projective techniques, companies can extract consumers' latent attitudes, behaviors and feelings.
www.buzzback.com

••• data analysis

Crosstabs and more

Decipher's reporting solution adds new features

Fresno, Calif., research firm Decipher has released a new version of its online crosstabs reporting tool. The interface now puts more control into the hands of the user – allowing clients to explore results and export findings into presentation-ready formats. The crosstabs tool is part of Beacon, Decipher's professional software platform, and will also be available through the company's research services offerings. Some of the benefits of the updated crosstabs reporting include: simplified user interface for data exploration and crosstab creation; user-customizable tables and charts including weighting, statistics, nets and summary tables; presentation-ready and production integratable results exports; and raw data downloads matched to each client's requirements.
www.decipherinc.com

••• panel research

Monetize those investments

Kinesis and Federated Sample aim to boost panel revenues

Austin, Texas-based Kinesis Survey Technologies LLC has announced an integration to Federated Sample's Fulcrum platform, enabling monetization of panel assets while retaining control over their use. Kinesis Panel is a software solution for managing online research panels and executing panel research studies. Fulcrum is a sample management platform and white-label routing solution that automates the sample delivery process. The integration provides many new capabilities within Kinesis Panel: sample optimization, for routing panelists to other projects for efficiency and improved retention; generation of new revenue streams by selling sample assets via Fulcrum; centralized reporting and analysis of panel and project performance when launching projects and selling assets within Fulcrum.
www.kinesissurvey.com

••• mobile research

The tale of the touch

Tool reveals how mobile device users engage with Web sites

Tel Aviv-based ClickTale has introduced ClickTale Touch, a SaaS solution that allows businesses to view their mobile customers' user experience, including every tap, double tap, scroll, tilt and pinch on the touch interface. Through its mobile-specific features, ClickTale Touch is designed to help businesses: identify and fix what's frustrating mobile users, such as poorly-designed pages or unclear calls to action; learn which images, links and content elicit the greatest response from visitors and adapt design to be more successful; and watch mobile-visitor browsing sessions to understand how they experience sites from a wide range of devices.
www.clicktale.com

••• mobile research

Either or both

Revelation product allows online, mobile or hybrid

Portland, Ore., research firm Revelation has released Revelation | NEXT, a mobile research product that can be used as an online-only, mobile-only or hybrid solution. Available in both iOS and Android formats, it is

designed to provide users with: online research capabilities; push notifications; mobile information gathering; online and offline image and video collection; and a social software feel and engagement with "likes" and comments. In addition, Word Clouds and Word Trees are designed to give structure to text feedback from participants.
www.revelationglobal.com

••• research education

ESOMAR guide answers current research questions

Aimed at industry vets and newcomers alike

ESOMAR has launched a new step-by-step guide for new professionals in the market research industry. *Answers to Contemporary Market Research Questions* provides new researchers and those who want to learn more about a research topic with a range of answers to everyday, but important, market research questions.

With content developed from more than 20 contributing authors from nine different countries, the book serves as a first point of reference to enable new (and sometimes older) researchers to orientate themselves and avoid walking into too many of the traps that the changing world of market research can create.
www.newmr.org

••• health care research

Ipsos Healthcare launches syndicated ethno studies

Focus is on patients' day-to-day struggles

London-based Ipsos Healthcare has launched Ipsos Healthcare SEES (Syndicated Expert Ethnographic Studies). The disease-specific studies will bring to life the day-to-day challenges of living with a chronic disease. Beginning with psoriatic arthritis (SEES PsA), the studies will reveal the patient perspective in three core areas: quality of life (lifestyle, coping mechanisms); medication (regimen, tolerance, compliance); and pathway to diagnosis (HCP interaction, time lapse). Initially available in the U.K., France, Italy, Spain and the U.S., they will be delivered in collaboration between Ipsos Healthcare's Global Therapy Monitors teams and the researchers from Ipsos' Ethnography Centre of Excellence.
www.ipsos.com/marketing-healthcare

••• Briefly

■ Montreal-based Voxco has launched a new Web site for its Acuity4 Survey Web survey solution to coincide with the release of a new version of Acuity4 Survey that now offers panel management, intelligent mobile rendering and integration with Dapresy for creating interactive dashboards.
www.acuity4survey.com

■ Accelerant Research, Charlotte, N.C., has released a new pricing model for do-it-yourself use of its BlogNog online qualitative platform: DIY Free, DIY Premium ($49 per project), DIY Ultimate ($249 Per Project), DIY Student (free) and DIY Unlimited ($999 per year).
www.blognog.com

■ New York-based Scarborough has released six-month data from Scarborough Puerto Rico, its first venture into qualitative data for the Puerto Rico market. Scarborough Puerto Rico also incorporates data from The Nielsen Company and Arbitron Inc. to calibrate the transactional currency TV and radio data with Scarborough's qualitative attributes. It is available to access and analyze through Scarborough's Web-based PRIME Lingo software.
www.scarborough.com

■ Information Resources Inc., Chicago, and SPINS LLC, Schaumburg, Ill., have formed a partnership to accelerate the growth of the natural and organic products industry by integrating SPINS' natural/organic food segmentation and industry knowledge with IRI's Consumer Network household panel. This will create a new natural/organic segmentation capability to help CPG manufacturers and retailers to identify and market to consumers and shoppers in the natural/organic sector.
www.iriworldwide.com

■ NIPO Software, Amsterdam, has launched Nfield CAPI for Android. CAPI for Android is the first interview channel for Nfield, NIPO Software's new multimode data collection solution. Nfield CAPI for Android is targeted at face-to-face surveys while using quota-based sampling techniques. Nfield CAPI for Android is released as software-as-a-service, running in the Microsoft Windows Azure cloud.
www.niposoftware.com

■ San Francisco-based MarketTools is now offering TOUCH, a blended solution of online qualitative and quantitative research designed to enable brands to understand and influence the consumer decision journey from the first spark of desire up until category exit. The method includes visual storytelling techniques and a touchpoint diary that allows consumers to relive their journey and explain relevant touchpoint encounters and pivotal journey moments.
www.markettools.com

■ Google has gained Media Rating Council accreditation for its viewability measurement solution, Active View, which it introduced last year. With Active View, advertisers will be charged only for impressions that meet the IAB's proposed viewability standard of at least 50 percent on-screen for one second or longer. Google says it will be building the viewability standard into products for both advertisers and publishers. Active View reporting will be available on the Google Display Network and in DoubleClick for Advertisers and DoubleClick for Publishers this year.
www.google.com/ads/innovations/activeview.html

Steering the vote: the case of the Oglala Sioux casino

| By Michael Lieberman

snapshot

The author uses a fictional example to look at how regression analysis can help determine which issues are important to – and likely to sway – voters.

Whenever presidential candidates give a campaign speech they are speaking to two different audiences: those who will vote for them and those who may or may not. These groups need different messages. Ardent supporters need reassurance, confirmation and an incitement to donate or become otherwise active. These messages often follow party lines. However, the voters on the fence have heard these platforms; they need something different, something that sways.

And from my experience working in political surveys, I can say that oftentimes the issues that will incite one group are not the same issues that will sway the other. Most elections, referendums or voter measures have two sets of drivers.

The first driving issue is what we'll call the base. This is the underlying sales pitch of a campaign: what a candidate stands for, what a new referendum will accomplish or the basic reasoning behind a measure. The second driver consists of those attributes which may sway voters one way or the other. These are the issues that may move a voter who is very unlikely to vote for the measure to neutral, or a likely voter to the "very likely" column.

This article illustrates a commonly used survey structure that can identify both types of drivers. The poll we employ is no longer than a standard survey (in the field, time is money). Yet by strategically placing questions, we can uncover both the base and the sway – double the information – within the questionnaire length.

Drivers behind a referendum

But before we can explain the solution, we first need to understand the problem. In this fictional example, our firm was contacted to identify the drivers behind a referendum to legalize gaming on the Oglala Sioux reservation in Pennington County, S.D.

The Oglala Sioux reservation is not far from both the Black Hills, which includes tourist attractions such as Mount Rushmore, and the Rapid City metro area. Rapid City is the second largest city in South Dakota. Of Rapid City's 70,000 residents, about 75 percent are classified as "white alone" – we'll refer to this population as Anglo. Rapid City has a low percentage of traditional minority groups, such as blacks, Hispanics or Asians. Instead, Rapid City's largest minority group is Native American.

In order to relieve a unemployment rate and other chronic social ills, the Oglala Sioux propose to open a gaming facility.

An earlier poll indicated these specific reasons for opposing the new gaming permit:

- This measure will lead to an increase in gambling addictions, bankruptcies and other social problems.
- Passage of this measure could lead to major expansion of gambling in the state.

This earlier poll showed a systemic, if subtle, prejudice in the Anglo community against the Oglala Sioux and a clear suspicion that gaming will bring the "wrong element" to the Black Hills and Rapid City. Native Americans, whether Oglala Sioux or other tribes such as mainstream Sioux and Dakota, who would be inclined to support the referendum, make up just 10 percent of registered voters. Therefore, for this referendum to pass, a large number of voters needed to be swayed.

And as the saying goes, if you don't like what

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people saying, change the conversation. Our firm was contracted to find out what to talk about. The Oglala Sioux council and their public relations team wanted to know why voters either supported or opposed the measure and which facets of the referendum they should stress in order to sway voters.

Given that approval of the gaming measure among the Native American population will be virtually unanimous, our survey was conducted among likely Anglo voters. These respondents were asked early in our survey how likely they were to vote for this gaming measure. We refer to this as pre-concept.

Next respondents are run through a series of positive statements regarding the Oglala Sioux gaming initiative and asked, on a 1-to-5 scale, how much they agreed with each statement. Such statements include:

- One important reason to vote yes on the measure is the fact that Native American casinos are now among the largest employers in the areas where they are located.
- In this measure, the tribes are voluntarily dedicating 5 percent of the net income from Native American gaming to local schools and education programs.

Immediately after the array of statements, the survey again asks how likely they are to vote for this gaming measure. This is named post-concept.

Given the structure of the survey, when we pool the results we will be able to see how important the different statements are pre- and post-concept. For example, perhaps people who strongly disagree with one statement, Statement A, have poor early opinions but people who agree with another statement, Statement B, tend to soften towards the issue at hand. Statement A would be a primary driver; Statement B has the potential to sway.

Predict an output

We discover these influences by using regression analysis. Essentially, regression analysis attempts to predict an output based on input and to determine which input variables were most critical to prediction. The outcome is called the dependent variable because it relies, or depends, to varying degrees on the input factors.

Figure 1

Post-Concept Support of Oglala Sioux Gaming Measure		
Native American Gaming Measure	Standardized Coefficients Beta	Significance
Among Likely-to-Vote Anglo Sample		
One important reason to vote yes on the measure is the fact that Native American casinos are now among the largest employers in the areas where they are located	0.40	0.00
This measure will preserve millions of dollars in state and local taxes that are generated each year by South Dakota Native American casinos	0.35	0.00
In this measure the tribes are voluntarily dedicating 5% of the net income from Native American gaming to local schools and education programs	0.31	0.03
This measure will preserve vitally needed tribal gaming revenues which fund education, health care and housing programs on reservations	0.29	0.16
Unless this measure passes, this issue would be decided by the federal courts, not by the state of South Dakota	0.10	0.34
A yes vote on this measure will protect thousands of jobs for tribal members and other local citizens in rural counties where jobs are needed most	0.04	0.77
Oglala Sioux Casinos have pledged to significantly fund local Black Hills Infrastructure	-0.03	0.82
This measure will help reduce unemployment and welfare on and near Native American reservations	-0.15	0.29
If this measure passes, local schools and community programs near reservations will receive millions of dollars in funds from Native American gaming revenues in the years ahead	-0.16	0.28

The outcome we are interested in is responses to the question "How likely are you to vote for this gaming measure?" Responses are measured on a five-point scale:

5 = very likely to vote for gaming measure
4 = likely to vote for gaming measure
3 = neither likely nor unlikely
2 = unlikely to vote for gaming measure
1 = very unlikely to vote for gaming measure

We will be using various statements as our input variables. After the regression is run, statements are sorted by their p-values (a measure of significance to the outcome). Those statements with a p-value of less than .10 (that is, are more than 90 percent likely to affect the voting score) are highlighted. These are the strategy key drivers.

Basis of support

The true basis of support for the gaming measure is found using post-concept regression. Why post-concept? This regression measures a voter's position after reading positive attributes. This would be the position of voters after having received an attempt to sway them.

Figure 1 shows the post-concept regression. Examining the output, we see that three of the statements received significance scores below 0.10. Each of these statements relates to factors that are for the good of the wider population: employment, local schools and money in the South Dakota coffers. This gives us good reasons why voters support the measure.

Post-concept support is important but with this survey structure we can also see what will change voters' minds in favor of the measure. That change could be from a "very unlikely" to "neither likely nor unlikely" or "likely to vote" to "very likely to vote."

To measure change, we create a variable which, for the sake of simplicity, we'll call improvement. Improvement is created simply by the steps below:

- improvement = post-concept - pre-concept
- if improvement is positive (1 or greater) we will set improvement = 1
- otherwise, if improvement is 0 or negative, we will set improvement = 0

In addition, all attributes are recoded to 1/0, with top scores 4 or 5 now simply coded as 1 while the lower scores 1, 2 and 3 are now all categorized as 0. We did this to better distinguish pro-voters. The results are shown in Figure 2.

By recasting the regression, another picture emerges. We can see our voters' sentiments after they were exposed to the positive statements. And now, our improvement score is simplified: either 0 becomes 1 or else there was no improvement.

When we examine results of the improvement regression, we see, among Anglo voters, a general theme of "It's good for us" and "We will not let federal courts decide" emerge as significant. These would be the statements most likely to sway voters or to show improvement.

Therefore, in order to successfully push the gaming initiative through, we recommended that the Oglala Sioux use a combination of both types of drivers: the issues that influence supporters and the issues that drive improvement.

Figure 2

Post-Concept Support of Gaming Measure

Native American Gaming Measure	Standardized Coefficients	
	Beta	Significance
Among Likely-to-Vote Anglo Sample		
Oglala Sioux Casinos have pledged to significantly fund local Black Hills infrastructure	0.24	0.01
If this measure passes, local schools and community programs near reservations will receive millions of dollars in funds from Native American gaming revenues in the years ahead	0.23	0.02
Unless this measure passes, this issue would be decided by the federal courts, not by the state of South Dakota, and this could result in the shutdown of Native American gaming in South Dakota	0.16	0.09
A yes vote on this measure will protect thousands of jobs for tribal members and other local citizens in rural counties where jobs are needed most	0.14	0.27
This measure will help reduce unemployment and welfare on and near Native American reservations	0.06	0.61
In this measure the tribes are voluntarily dedicating 5% of the net income from Native American gaming to local schools and education programs	0.02	0.88
One important reason to vote yes on the measure is the fact that Native American casinos are now among the largest employers in the areas where they are located	0.02	0.85
Native American tribes have made significant investments in their gaming facilities, and this measure will assure that they have an opportunity to make a return on their investment	0.01	0.90
This measure will preserve millions of dollars in state and local taxes that are generated each year by South Dakota Native American casinos	-0.03	0.78
This measure will preserve vitally needed tribal gaming revenues which fund education, health care and housing programs on reservations	-0.09	0.58
Dependent Variable: Improved Opinion From Q13 to Q40		

Often, as was the case here, these two categories are not identical. For example, if an on-the-fence voter does not necessarily agree that enlarging state coffers with a new gaming facility is a good reason to permit one, hit him with "Well, would you rather leave this up to federal judges in Washington?" The chances of changing that voter's mind, or at least coaxing him to reconsider support for the gaming initiative, will likely increase.

Increase support

When tracking a campaign – be it for a Native American casino initiative, a state senate seat or the race for the White House – it is critical that the strategic communication team understands how to increase support. Asking why voters take certain positions, and what moved them there, is essential.

Our technique assesses the potential of various statements. These messages can then be used in advertising or campaign speeches. While traditional techniques might evaluate the statements individually on a more stated- impact basis, our approach focuses on the actual impact of the statements. Identifying which statement has the greatest positive change – not necessarily which is the most-liked or well-received – is the key to improving support.

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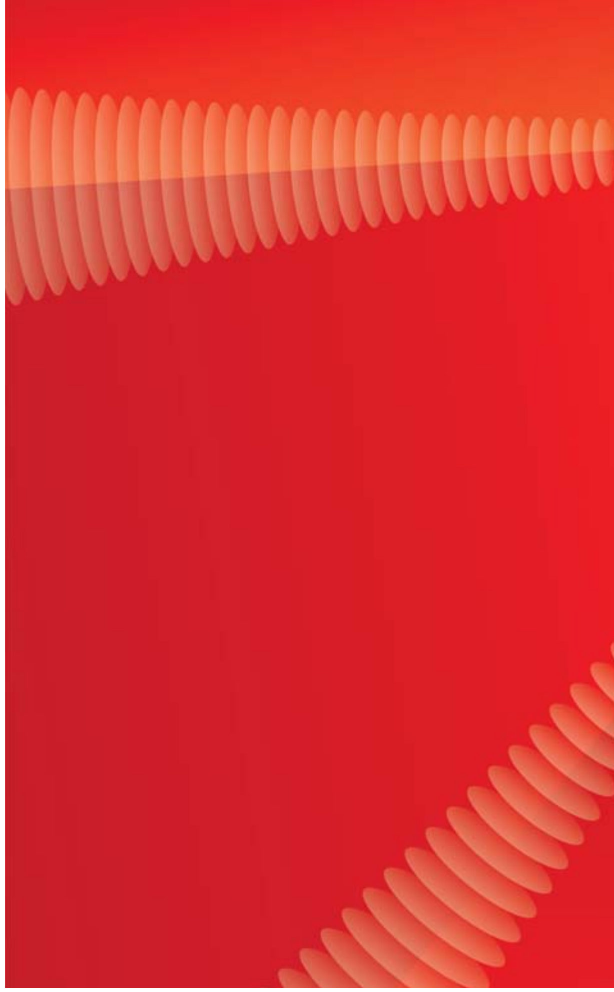

••• shopper insights

On becoming designers as well as researchers

Why behavioral economics is the future of shopper insights

| By Will Leach, Peter Harrison and Tom Ewing

snapshot

The authors argue that the future opportunities for shopper insights lie in the ability to understand and tap into how people make decisions in a specific shopping context and how they are influenced by in-store factors such as sounds and scents.

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It's already been 20 years since shopper insights began establishing itself as a distinct discipline within marketing research and most in the field would say its best days are ahead of it. Our discipline is growing and expanding and stands to benefit more than most from a shift to mobile research. Mobile interviewing, mobile-assisted ethnography and location analytics can join neuroscience, virtual shelves and trip-mission segmentations as new tools in the shopper insights tool belt.

The future is bright but there's much room to take shopper insights further and faster. Many say it will be driven from the aforementioned technologies and data. We agree that technology will push our discipline forward. However, the strongest drivers of shopper insights will not come from changes in technology. Rather, we believe that the future of shopper insights will be fuelled by a changing in our collective roles and mind-sets, moving from "only" providing shopper insights to also pushing our discipline's focus to a critical business-driving function, becoming the agents of behavioral change in-store.

How will this transformation happen when shopper insights has historically been so brand-centric? We have focused on a customer's decision journey through a brand lens, i.e., how they come to choose one particular brand over another. This thinking has shaped how marketers have approached shopper insights' great theoretical breakthroughs – like P&G's famous "first moment of truth." This pointed out – quite rightly – that a shopper typically takes only a tiny handful of seconds to make a decision about a purchase and that this is a marketer's main window to influence them. In the brand-centric world of shopper insights, that puts the onus on the brand to convince the customer to choose it over another with packaging, POS marketing and so on.

This approach has unlocked precious insights and inspired a generation of shopper marketers. But does it also give too much influence to the brand? After all, there are many factors that sway shopping decisions far outside of

a brand's influence. Habit, for one. Mood, for another. In other words, emotional triggers that have little to do with information or brand messaging. How about the time of day or the impact of weather on choices? How do we account for the way choices are presented, in terms of pricing and layout? When shopper insights focuses only on brand-centricity (aka bringing their brands to life in-store) these personal, social and environmental factors that drive the majority of sales in-store might not get the attention they need.

There's another problem with a brand-focused shopper insights. A brand-centric mentality limits the shopper insights departments to only understanding the "what" and "why" of shopping behavior. But who owns the "now what" part of the equation that is so often talked about these days? There's increasingly a demand in corporate America for insights to do just that, to do more than just provide shopper insight. Increasingly we are asked to drive business by changing shopping behaviors not just understanding them.

Expand our focus

It is clear that our specific discipline is best positioned to actually design for behavioral change. Who understands shopping behaviors better than us? But to do this, we must expand our focus from brand-centricity to behavior-centricity and really start to grasp and design for the way we actually make decisions.

Luckily our understanding of decision-making has expanded dramatically over the last few years. There has been a boom in behavioral science, often described using the catch-all term behavioral economics, though it includes a lot of neuroscience and psychology too. We can now truly understand shopper decisions by applying the wider framework provided by behavioral science and then use these principles to design for behavioral change.

The leading voice in decision science is that of Daniel Kahneman, the psychologist who won the Nobel Memorial Prize in Economic Sciences and who is the author of the best-selling book *Thinking, Fast And Slow*. Kahneman's theory of decisions – based on 30 years of experimental study – is simple but powerful. Human beings have two interlinked decision-making systems, which he calls System 1 and System 2. System 1 thinking is largely automatic, implicit and intuitive – we don't realize we're doing it. System 2 thinking is more considered and aware – it's what we feel as thinking.

This sounds like many other theories of how the brain works – left-brain and right-brain thinking, for instance, or a division between our reptile brain and higher functions. But what Kahneman has done is to overturn ideas about the power of these systems. In his thinking, System 1 and 2 are not a balance of the emotional and rational or rapid and considered judgements. System 1 is by far the dominant partner. In fact, all of our decisions are led by System 1, with the slower and more effortful System 2 changing the decision only when System 1 cannot find an easy and plausible course of action. System 2's role is otherwise simply to ratify and justify decisions. To quote advertising guru Rory Sutherland, System 1 is the Oval Office; System 2 is the press office.

So if we use System 1 to make decisions, what determines their outcome? System 1 is guided by a variety of things – past experiences, habits, heuristics (rules we might follow for instant decision-making, like "bigger is better") or emotional associations. It's also – and here is where shopper insights come in – strongly directed by the shopping environment.

What decision science makes clear is that we often behave irrationally. The "first moment of truth" – those split seconds in which a decision occurs at-shelf – is indeed crucial, because we use System 1 to make very fast decisions. But these decisions almost never involve a considered, rational choice between brands. Even our preexisting brand preferences are neither constant nor stable, due to the shopping environment itself. The environment around our brands – including flow, store layout, alternative offers, adjacencies, sensory triggers and messaging – has a strong psychological impact on our decision to buy or not buy.

Won't be enough

So only using your shopper insights as a means to build stronger brand equity in-store won't be enough in tomorrow's corporation. Generating consumer pull alone rarely guarantees a sale these days. In a world where the typical person is exposed to hundreds of marketing messages and makes thousands of decisions daily, the chances of any one brand message being able to influence someone's decision are vanishingly low. The future opportunities lie in our ability to understand and tap into how people make decisions in a specific shopping context.

That's why we believe that the behavioral sciences, particularly behavioral economics, are the future of shopper insights. These fields are rich with insight on the whys of shopping behavior. But more importantly, by focusing on the shopper environment and advancing via experiments, they uncover practical ways to apply these insights to everyday marketing and innovation, which is the very need emerging from business.

Take, for instance, a pair of classic studies showing the effect of music on the sales of wine. In one, researchers controlled the music in an English shop selling both French and German wines. They alternated between playing French music and German music at a low, background level in the shop and otherwise used no other promotional or unusual tactics. When French music was played, French wine outsold German wine by five times. But when German music was played, the situation reversed – now German wine outsold French by two-to-one. None of the customers, when interviewed, mentioned the music as a reason for their choice and yet nothing else had changed. Meanwhile, a separate study found that playing classical music boosted sales in a wine shop, whereas playing rock music depressed them. We see in these studies the power of embedded emotional and cultural associations over sales but they also serve to spark the imaginations of shopper insight professionals looking for inspiration.

These kind of studies – practical explorations of the impact of the choice environment on decisions – are becoming more common. The question for shopper insight professionals is how to design a research structure which lets them be practically applied. You have to be willing to become designers as well as researchers.

At BrainJuicer we have been sharing a case study conducted with Dutch lingerie retailer Hunkemoller, which allowed us access to several of its stores to introduce behavioral interventions in the areas of signage (stickers in various places in the store) and behavioral priming. Priming is where behavior is influenced by seemingly unrelated or semi-related stimuli – like the music in the wine shops – which help trigger particular actions. We used scent primes to remind shoppers of romantic occasions and chocolate primes to make them feel happy.

We then designed a research structure where different interventions were "on" and "off" in alternating weeks across a six-week period and in several different stores. This meant we could factor in seasonality, regional differences, changes in footfall and other variables, as well as test interventions in combination. Our metric was actual sales; an advantage of this kind of behavioral design is that results can be measured in real-world sales. The most successful combinations – involving scent – showed as much as a 20 percent uplift in sales.

What's the future?

This project was an example of how shopper insights based in behavioral science move our industry from insights advisors to designing and testing behavioral tactics for brand and retail growth. So what's the future for shopper insights? What do we need to do to incorporate behavioral and decision science into our work? We believe there are four steps.

First, we need to move from a focus on shopper needs as the driver of action to a focus on choice environments, understanding the context behavior happens in.

Second, we need to move to a design mentality, designing in-store marketing that makes System 1 decisions easier and seeing ourselves as an active, not simply an analytical, influence on the shopper experience.

Third, we need to move from brand design to behavioral design. In other words, we are not designing improvements to the brand but interventions to change behaviors that drive business – from which the brand will benefit.

And finally, we need better integration of shopper and other marketing, so that pre-shop and post-shop decisions – also guided by System 1 – align with the rapid decisions taken in-store.

These changes aren't simple ones – they involve a revolution in perspective even before their practical implementation – but if carried through they will help shopper insights make a historic leap: becoming a research discipline that moves from observing and advising to genuinely changing behaviors and driving corporate business.

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shopper insights

Be there now

Leveraging mobile and online qualitative to get inside shoppers' heads

| By Jim Bryson and Jessica Ritzo

snapshot

The authors detail how to combine mobile and Web-based qual approaches to study the complete shopping experience.

Until recently, shopper research had remained largely unchanged by technology advances. Now, consumers' daily use of technology and research technology development has reached a tipping point that gives researchers a 360-degree view of the consumer's world before, during and after the research. For marketers that means far deeper, far richer insights into consumer behavior.

With a greater percentage of younger consumers in the marketplace, use of communication and information technology is exploding. As consumers become more comfortable with online and mobile technology, so, too, must researchers become more comfortable with using online and mobile approaches to drive better and faster insights.

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

Coupled with online use, everyone, it seems, has a mobile phone. Indeed, the International Telecommunications Union reported that 256 million Americans had a mobile phone with 3G or better service in 2012. And they're certainly not just being used for phone calls. From accessing the Web to texting to taking and sending pictures and videos, phones are now for so much more than just voice communication.

Gartner reports that 85 percent of all mobile phones shipped in 2011 included an Internet browser and consumers are not hesitating to use them. In fact, Kinesis Survey Technologies reported that 25 percent of its quantitative surveys were completed using a mobile device in Q3 2012.

Qualitative research is experiencing the same trend. At 20|20, we see up to 20 percent of our online qualitative research being accessed by mobile devices. Consumers are using mobile technology, even when the research is not designed exclusively for mobile!

For researchers, the mobile boom is a bonanza. For decades we have yearned for a way to communicate unobtrusively with our respondents as they perform normal daily tasks. We have constantly sought to immerse ourselves in consumers' lives to understand their real behavior while impacting that behavior as minimally as possible. Now we have the yearned-for ubiquitous device and, when partnered with Internet-based approaches, we have the ability to better see and understand the full story behind consumer behavior.

Layering the tools

Combining online and mobile approaches is a powerful way to understand consumers' entire shopping experience, including pre-shop, in-store and post-shop aspects. Though it may seem daunting, layering these types of tools within a single project can be relatively simple.

One approach is to combine an asynchronous text-based method, such as one-on-one in-depth interviews for ongoing feedback and discussion or digital diaries for a foundational understanding of consumers, with mobile engagement to capture in-the-moment feedback during the store visit. By structuring the methodology to lead and finish with the online component and including the mobile piece in between, you give consumers multiple convenient, easily-accessible formats through which to communicate with the moderator at the times their feedback is sought.

In other words, it lets researchers better connect with consumers on consumers' terms and gives consumers appropriate tools to participate where and how they need to with minimal disruption of their daily lives.

So what does each approach entail and how do the individual pieces combine into one complete methodology? Let's take a look phase by phase.

Pre-shopping

The first phase of text-based online engagement allows consumers to share rich, insightful details of their pre-shopping thoughts, needs and behaviors using their computer. Using an asynchronous online bulletin board format means respondents can work through the researcher's lines of questioning and group discussion comments (if any) at their own pace, participating each day when the timing works best within their schedules.

Of course, the specific content of this phase will be determined by the research objectives and the duration of the first phase will be determined, at least in part, by the content (though timing and budget considerations have inevitable impact, as well).

As an example, this first interaction may be geared toward better understanding the target consumer and his/her lifestyle outside of the context of any particular brands or products. Or perhaps it includes a focus on pre-shopping behavior (how consumers plan their shopping trips, how they organize their shopping lists, how they plan to approach the store, etc.). Or maybe this phase includes product usage exercises to allow the team to not only read about but also see (through photos and/or videos) which products consumers use and exactly how they use them.

Clearly the flexibility of the online approach lends itself to a wide range of possibilities, which is one key reason it works so well as the first phase of engagement.

Toward the end of this first phase, the online platform also serves as a convenient place to present consumers with expectations and requests related to the in-store piece of the methodology, which often follows as the second phase. While the consumer feedback provided during the in-store experience will be shared via mobile, oftentimes the instructions consumers need are longer and more detailed than what is easily viewed on a smartphone screen.

Leveraging the online tool to explain what's coming up in the mobile piece of the project links the phases together for participants, gives them an opportunity to read through what will be expected of them in the store and lets them ask clarifying questions without being limited to their smartphone's smaller screen and touchkeys. Additionally, if using a mobile tool designed to work in conjunction with the online platform, information on downloading the mobile application to be used in-store can also be posted in the online space.

In-store

While the online component works well for thorough, detailed consumer feedback and discussion, the mobile piece of this methodological puzzle is best used for capturing succinct comments and photos during the shopping experience.

One could argue that independent mobile shopalongs enable consumers to shop more naturally than more traditional moderator-accompanied shopalongs. For this to be the case, however, the mobile feedback requested of participants should be brief and on-point so as to cause as little disruption as possible to their typical shopping behavior.

For example, asking consumers to snap photos of products or merchandising materials that grab their attention and briefly explain why they notice these items is a reasonable request. On the other hand, asking consumers to detail their every move through the aisles, describing each purchase consideration along the way, is not so reasonable. For that type and granularity of feedback, there are other approaches likely to serve you better. In-store use of mobile is best kept streamlined and specific; the opportunity for greater detail will come in the final online phase which will enable consumers to take their time, reflect on their shopping experience and provide additional context to their in-store feedback.

Post-shopping

Continuing the engagement with consumers back in the online platform after completion of the shopping exercise allows for probing and for deeper discussions of in-store choices, considerations and behaviors. The post-shop online phase can also be used to open up conversation between respondents, taking what may have been an individual approach up until this point and making it a group discussion. Additionally, if better understanding product usage is part of the research objectives, this online phase can include questions and exercises geared toward that, such as a self-recorded usage occasion supported through written feedback, as an example.

Case study

To better develop a new marketing initiative, a client in the beverage industry needed to better understand its target consumer from a broad perspective and gain a sense of how they think about the client's brand. First and foremost, we needed to get to know these consumers as people: What are their lives like? How do they spend their time? What is most important to them? Once we had this understanding of them, we wanted to learn how certain brands, including the client's, fit into the framework of their lives.

To begin immersing ourselves, we started with a phase of text-based in-depth interviews (IDIs) conducted via an online bulletin board platform. Over the course of five days, we explored consumers' lifestyles, values, interests and priorities. While this approach was primarily text-based, we also included Webcam responses and photo-journaling exercises to add layers to the feedback and help bring the consumers to life.

Following the IDIs, we incorporated a shopping assignment with a mobile-response component. During the shopping trip, consumers shared photos and brief comments (via the online platform's mobile app) related to impulse purchases as well as products they had planned to purchase but ultimately decided against. Additionally, within the beverage section specifically, consumers shared photos of "new" products (meaning new to market or previously unnoticed by the individual consumer) and their initial impressions of them.

After completing the in-store exercise, consumers returned to the online platform for two more days of one-on-one discussion. As with the first phase, this round of IDIs was primarily text-based but also included Webcam responses and photo uploads. This portion of engagement focused on understanding consumers' relationships with various brands and the role their lifestyles, values and priorities played in establishing brand preferences and influencing purchase decisions.

By the end of the fieldwork, the text-based IDIs yielded a full picture of the target consumer – how they live their lives and what matters most to them – as well as valuable learnings around consumers' perceptions of various brands (including the client's) and drivers of brand preference and loyalty.

Additionally, the Webcam responses included in the first and third phases not only provided a more conversational element but also became valuable footage in highlight reels used to bring the target consumers to life for the broader client team. Further, the mobile shopalong phase helped uncover in-store elements that captured consumers' attention and prompted purchase consideration, as well as key barriers in the store that prevented consumers from considering or purchasing a product even if they had previously planned to purchase it on the trip.

Leveraging technology

As we've seen in our work at our respective firms, technology has finally – and dramatically – changed the landscape for qualitative research. With consumers now prolific in their use of both online and mobile technologies, researchers can utilize a variety of methods to obtain in-store insights and the pre- and post- context that illuminates the purpose behind the behavior.

Shopper insights can now truly be a 360-degree experience.

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shopper insights

Closing the gap

Eye-tracking helps reconcile the disconnect between shoppers' words and their actions

| By Scott Young

snapshot

Scott Young uses retail case studies to share tactical insights for enhancing in-store-marketing and discusses recommended applications of in-store eye-tracking.

Marketers are increasingly recognizing the importance of influencing the many purchase decisions made in-store through more effective shopper marketing. In their efforts to "win at retail," most have quickly learned that observation is the key to understanding the shopping experience. Given the overwhelming amount of product choices, in-store decisions are largely physiological and subconscious: Shoppers are driven by habit – and by what they what they see (and miss) during their trips down the aisle. Thus, asking people direct questions (i.e., How did you decide what to buy?) often elicits logical but misleading answers, because people don't know exactly how or why they made decisions.

This gap between what shoppers say and what they do led us to explore bringing eye-tracking technology to actual stores. This is done via eye-tracking glasses that create a video of each person's in-store shopping experience (including his/her focal point), documenting both macro-level behavior (store/aisle navigation) and micro-level actions (readership of packaging and POP materials).

This article shares highlights from three recent studies utilizing eye-tracking in retail stores. It summarizes specific learnings from each study and speaks to how these findings link to larger underlying shopping realities that we've seen across studies, categories and countries. Through these examples, we'll also share tactical insights for enhancing in-store-marketing and discuss recommended applications of in-store eye-tracking.

Case study: Too much choice

Our initial case study involved a frequently-shopped food category: a grocery aisle that many people shop weekly or bi-weekly, as a staple of their diet.

Not surprisingly, our research across numerous retailers and three channels (grocery, mass and club stores) revealed a largely consistent pattern: Shoppers were on autopilot. They typically spent under a minute in the aisle and grabbed a single prod-

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uct. Levels of observed comparison-shopping were remarkably low (about 5 percent). Unfortunately, levels of incremental or unplanned purchases were similarly low, which limited profitability for both manufacturers and retailers.

While some of these findings were obvious through more traditional forms of observation, the eye-tracking revealed a deeper and highly actionable insight: Shoppers were frequently buying the brand they saw first. In other words, shopping in this aisle was not necessarily a matter of people finding "their brand" and putting it in the cart. Instead, shoppers were selecting the first brand (presumably within a set of acceptable brands) that met their primary criteria (flavor, form, etc.).

For many years, we've known that retail visibility is a key driver of success ("unseen is unsold"). However, this study took that learning further, by suggesting that preempting competition (via displays, strategic shelving and breakthrough packaging) is critical, particularly in habitual grab-and-go categories.

Of course, this study also ties to a universal shopping reality: The burden of "too much choice." As categories continue to expand, shoppers everywhere are overwhelmed at the shelf. With hundreds of choices to consider – and limited time available to shop – they instead tune out and default to the familiar (i.e., their regular brand) or the first brand seen, to save both time and aggravation.

As a result, it becomes ever harder for new products to succeed – and for marketers to drive incremental purchases. Indeed, in this particular study, it was telling that we saw the highest degree of unplanned purchases (and comparison-shopping) in the club channel, where the category was far less complex (with larger packages and fewer options).

Case study: The great disconnect

A second study focused on a very different category and shopping experience: a consumer electronics product that was purchased infrequently and required more information and a larger investment.

Here, our research across several countries (the U.S., China and Western Europe) and multiple retail channels focused on a different dynamic: the role of various marketing vehicles and materials along the path to purchase.

As with the earlier example, some findings were quite predictable, most notably the significant role of planning (Internet-based research, publicized discounts, etc.) in influencing or framing the shopping trip. However, even in cases of extensive planning, in-store observation confirmed that these shoppers were comparing products and making decisions in the aisle.

In this case, the eye-tracking documented engagement with different vehicles (packaging, product displays and point-of-sale signage/materials) within the in-store discrimination process. Specifically, we found that, when physical product displays were available (typically in computer superstores), they were nearly always the initial source of attention – and the primary driver of decisions. In these situations, POS displays and packaging were generally relegated to a supporting role (confirming specifications, compatibility, etc.). Meanwhile, in channels without product displays, shoppers typically relied on packaging (rather than POS materials) to compare products.

In fact, we uncovered that shoppers' engagement with different types of POS varied widely. While some materials (most notably those with unique shapes and appearance) were regularly part of the shopping process, many other forms were consistently ignored – and most likely represented a waste of resources. The primary implication – that it is better to limit and focus in-store marketing efforts ("less is more") – was quite clear and consistent with what we've seen in other studies (at quick-service restaurants, convenience stores and other retail channels).

Observing these technology shoppers also spoke to a larger shopping reality, which we call The Great

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blueocean market intelligence
602-441-2474
www.blueoceanmi.com

C+R Research Services, Inc.
312-828-9200
http://crresearch.com

The Channel Checkers
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www.thechannelcheckers.com

Clearworks
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www.clearworks.net

EyeTech Digital Systems, Inc.
877-439-3832
www.eyetechds.com/research

Field Surveys & Audits, Inc.
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www.fsamerchandising.com

GfK Consumer Experiences North America
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www.gfk.com/us

Gongos Research
248-239-2300
www.gongos.com

Illumination Research
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www.illumination-research.com

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www.markettools.com

Meyers Research Center
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www.meyersresearch.com

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

Secret Shopper » SEE AD p. 34
763-525-1460
www.secretshopper.com

SmartRevenue
203-733-9156
www.smartrevenue.com

360 Market Reach, Inc.
917-584-8174
www.360marketreach.com

Video Chat Network
914-722-8385
http://videochatnetwork.net/index.php

Disconnect. Across categories, we often find that shoppers come to the shelf thinking in terms of users and usage occasions (Will this product serve my specific need?). In the aisle, however, they frequently encounter a bewildering range of choices that emphasize product forms, features, benefits or sub-brands.

Point-of-sale materials that help bridge this gap – by linking features/benefits to users and usage occasions – are often the most successful in closing the sale (and driving incremental purchases).

Case study: Stopping power = content + store placement

A third study also centered on in-store signage and displays but in the very different context of a popular beverage aisle (in North America and South America). In this heavily-merchandised category, the primary objective was to understand which POP materials were consistently seen and which were ignored.

In this case, the findings highlighted the critical role of store placement and the fact that the location of merchandising can actually be more important than the creative execution. Without question, the clearest and most dramatic learning was that ceiling-based signage was completely ignored: Across dozens of videos, across countries and multiple stores, we did not see a single shopper look upward to engage with overhead promotional signage.

This finding is largely consistent with our experience across studies and retail channels: Shoppers may use ceiling-based materials to guide store navigation but once they are in the aisle, their focus is straight ahead or slightly downward. Thus, point-of-sale materials at eye level or arm level (interspersed with packages) are far more visually impactful than materials above the products.

In addition, the study revealed an interesting disconnect between retail visibility and communication. In fact, several of the ceiling-based signs, which were completely missed by shoppers, were actually among the most compelling to shoppers when they later saw them upon forced exposure. Conversely, some of the most visible displays were not particularly compelling. The implication – and larger reality – is that shoppers aren't consciously choosing what to look at in-store. Instead, stopping power and in-store visibility is primarily a function of location/placement and contrast (with the surrounding environment) – and we shouldn't assume that the most compelling displays will be the most visible ones. Therefore, marketers should think of visibility and content as two separate (and equally important) drivers of in-store success. To drive sales, they need to optimize both creative execution and store placement.

Patterns have emerged

Certainly, we're always cautious about generalizing, as the "right" shopper marketing strategy will inevitably vary by situation. However, across countries, product categories and retailers, several patterns have consistently emerged from our in-store research:

A great deal of POS investment is wasted. As illustrated in the cases above, this is often due to either poor store placement (resulting in limited visibility) or to excessive merchandising (which overwhelms the shopper).

Packaging and displays/signage have different strengths and roles in the shopping process. Displays and signage can be viewed as closer to an extension of advertising, in terms of their ability to drive awareness/attention, to create an emotional connection and convey a single key message. Packaging, as the embodiment of the product, is somewhat more factual and rational in its nature. As shoppers get closer to their actual purchase decision, they are looking for key information and reassurance (i.e., Is this the right product for me?).

Given these realities, marketers and retailers can significantly improve their shopper marketing efforts by keeping a few simple, tactical principles in mind: keep it simple; connect emotionally; work from the floor up (not the ceiling down); surprise and delight (via unique appearances and approaches); facilitate shopping, don't impede it!

While this last point might be self-evident, it is frequently ignored. We repeatedly come across situations in which signage or shelf-ready displays obstruct packaging (and thus limit information delivery). In a recent study, we saw that shoppers were actively avoiding POS stickers on freezer doors, in their efforts to find the products/packages behind them. Shelf blades were far more effective, as they drew attention and helped shoppers navigate the aisle and didn't block shoppers' view of packaging, once they began actively considering products.

Two helpful applications

Across our studies, we've identified two helpful applications of in-store eye-tracking: understanding in-store shopping behavior (particularly the role of visibility within the path to purchase) and guiding, assessing and enhancing point-of-sale merchandising (both creative execution and in-store positioning).

We've also found eye-tracking useful in helping marketers identify opportunities and guide in-store marketing strategy for alternative retail channels (such as convenience, club stores and traditional trade/kiosks in developing markets).

Finally, we've found that eye-tracking can add value in both qualitative and quantitative in-store research studies. In qualitative studies, the shopper videos are a primary output, often illustrating an observed behavior (such as shopper confusion or frustration) in a compelling and visceral manner. In quantitative studies, the value often lies in documenting visibility of specific displays or POS materials, typically via numerical data.

Across studies and applications, the commonality is that giving marketers and designers a shopper's eye view of the retail world provides them with a better understanding of the shopping experience – and a greater appreciation for the complexity of the retail environment. This insight typically leads to more effective in-store marketing campaigns, based on observed behavior – what shoppers do as opposed to what they say.

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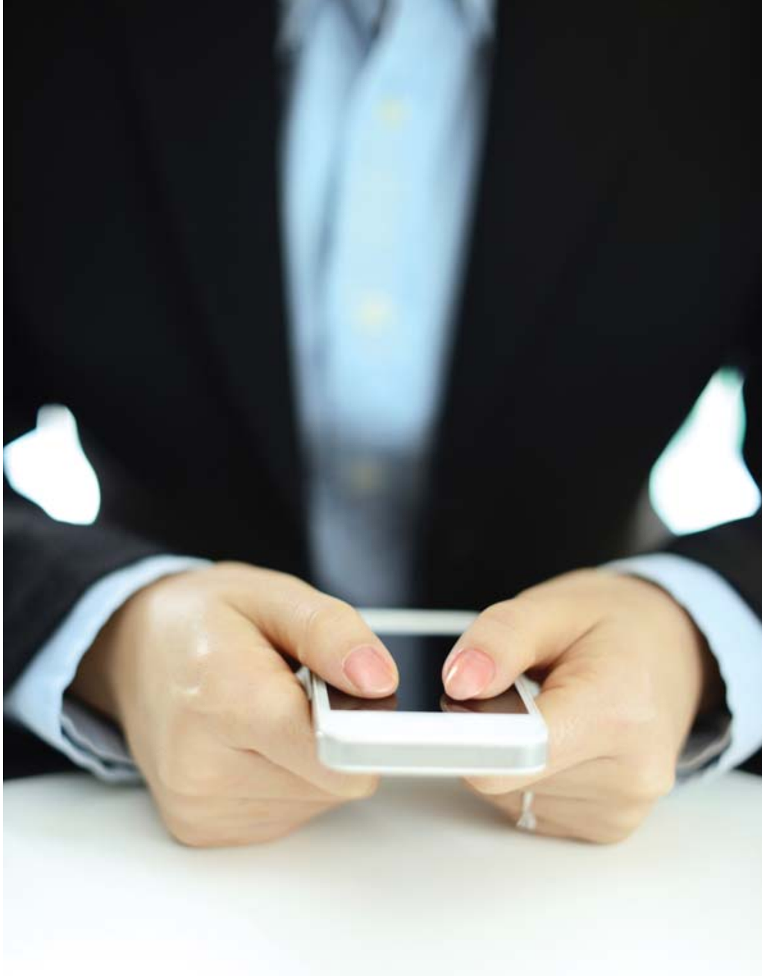
●●● mobile research

Character counts, characters count

How mobile helps establish connections with consumers

| By Julie Wittes Schlack



snapshot

A look at some of the many applications of mobile research, beyond straight surveying, and how they can help brands build bonds with consumers.

The explosion in mobile adoption has enabled market researchers to expand their ability to connect with consumers in the physical and temporal contexts of their daily lives, opening up all kinds of possibilities. Since people are already photographing their meals, tweeting their product reactions and otherwise chronicling experiences as they unfold, why not learn from those behaviors and postings? And since geofencing technology (see article on p. 56) can trigger an action when someone crosses a geographical boundary, why not routinely survey shoppers on their smartphones the moment they enter the store? Who needs a mall intercept when you can get even more targeted and without all that human labor or social awkwardness?

It's true – mobile technology lets us establish connections with consumers in unprecedented ways. But before abandoning live and online and interpersonal methods, we have to consider the quality of and best uses for those in-context, in-the-moment responses. Will a busy mom, shopping for groceries with children in tow, give useful or detailed feedback through a mobile survey? Will a customer at a pharmacy log his impressions with precision and candor? And even when the answer to both questions is yes, what more can brands achieve when they collaborate with active, engaged consumers in an ongoing way?

Results were similar

In 2011 – the early days of mobile surveys – Gongos Research, Auburn Hills, Mich., tried to answer some basic questions about the quality of mobile survey responses by comparing the average character count from a mobile survey to the identical survey administered online. They found that the results for open-ended questions were very similar, with smartphones actually yielding slightly longer responses – an average of 65 characters vs. 59 for online surveys.

This finding surprised us, as our empirical sense was that online surveys conducted in our private online communities generated much higher character counts than did mobile surveys. To put our instincts to the test, we conducted a quantitative comparison of 1,178 member-generated, open-ended survey responses gathered via mobile and online surveys and analyzed character

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counts from each. Qualitatively, we looked at thoughtfulness of responses and compared themes between each of these data collection methods. Results suggested that, while we gather more member-generated text via online surveys – an average of 136 characters for online responses vs. 50 characters for mobile ones – members' short mobile responses were nonetheless extremely valuable for an in-the-moment, focused learning objective. (See "Character counts: a comparison of mobile and online open ended survey responses" at http://tinyurl.com/m877dkj for more detail.)

Our findings from this study have informed our approach to using mobile techniques within the online community setting – when to employ them, how to design fruitful projects and, most importantly, how to use mobile technology in conjunction with other methods to fuel ongoing, productive collaboration between brands and consumers.

Mobile surveys, ethnographies, mobile metering and now even mobile-enabled remote shopalongs can answer the question of what the in-store experience looks and feels like. For instance:

What's causing a drop in sales? A food company was seeing significant decline in the sale of a specific SKU when it changed the shape of its 64-ounce jar. Was the new design the source of the problem? To find out, we asked this client's community members to go to the relevant aisle, take a picture of the shelf and answer a few closed-ended questions about what they were seeing there. Their answers confirmed our client's hunch – the new jar was indeed creating confusion. But they also revealed the fact that in many cases, the product simply wasn't on the shelf, alerting this client to a distribution and stocking challenge it might not otherwise have uncovered.

What merchandising strategies are most effective? A simple ethnographic exercise, in which we asked participants to capture the in-store sights and sounds that caught their attention, yielded eloquent pictures and captions that told a big, actionable story. They validated the expected finding: big signs and good deals break through the noise and drive impulse purchases. But they also revealed the surprising power of simplicity, exclusivity and humor in packaging and displays.

How are shoppers using mobile apps in the store? Mobile metering apps capture and transmit log data from people's smartphones that, when aggregated, provide a longitudinal view of what people are doing on their phones, at what times of day and in what locations. Of course people must provide their informed consent to participate in these types of projects and install the necessary app but if they do, it's possible for manufacturers and retailers to learn what specific shopping, scanning, financial management or other apps are being invoked when people are in specific commercial locations. In our experience, this type of data won't help you understand why but can at least reveal a pattern that's worthy of deeper, more direct inquiry.

What's the sensory experience of shopping a specific category? Mobile-enabled collaboration apps like Kibitz let small private groups share media, text, files and locations and do it all in real time. We were curious to see whether such apps might let us effectively conduct virtual shopalongs. After having gone bra shopping at one major retailer, shopping for personal care products at another and Black Friday shopping at multiple stores with an entire multitasking family, we're delighted to say that the answer is yes. Pictures of half-stocked shelves, dirty changing rooms, in-the-moment accounts of sales staff dishing about their manager's absence, concrete suggestions for how to improve product arrangements and signage – all of these inputs had an immediate and profound impact on our clients and their customers, the retailers whose stores these consumers were shopping in.

Biggest breakthroughs come from outside

However, the biggest breakthroughs often come from outside the store, outside the category, even outside the shopping mindset. For example, the success of a major apparel firm catering to youth around the globe depends heavily on staying ahead of the fashion trends and getting inside the aesthetic sensibilities of their consumers. To that end, they run periodic ethnographies in which they simply ask members of their communities to share videos and Instagrammed images of what inspires them. From chalk graffiti on an alley wall to colored lamps in a London market, some of the most sensorially and emotionally exciting objects lie outside the category and have much to teach.

Here's another example. When Proctor and Gamble was developing scents for a new product line, it asked members of its online community to simply record the scents that they encountered over the course of a day that made them feel good. By week's end, they had images, videos and simple text odes to cut grass, fresh paint, Playdough and other aromas that revealed volumes about how scent triggers not just nostalgia but feelings of competence, adventurousness, comfort and other powerful emotions.

This scents project illustrates how mobile enables discovery around a specific sensation. But P&G also embarked on an ambitious attempt to get a more holistic understanding of its consumer – who she is, where she goes, what she sees. So, using a mobile ethnography application, we asked community members to share "beauty moments" – the sensory experiences and encounters with beauty products and brands that they have during the week, both at home and out in the world. We learned in great detail about how they feel at different times of day, in different contexts, about what triggers them to use an existing product or try a new one.

Go deeper

Beauty is a highly subjective attribute and feeling beautiful is a highly dynamic state. So P&G enlisted its community members to help it go deeper, not just through more personal, one-to-one sharing via these mobile apps but through collective collaboration. After all, while emerging new tools and apps make people more accurate reporters, they still have to be willing to do it. That's why it's so important to be able to establish intimacy, trust and relationship in one venue, like an online community or series of advisory group meetings or online chats, that you can then apply to mobile projects, and vice versa.

In this example, P&G was trying to discover the parallels and discrepancies between how women see themselves and how others see them. So community members simply used their phones to take pictures of themselves in the moment – at home or at work – and posted them, along with their own critique. Then other community members privately and anonymously commented on the images.

"This is me after work. I am still wearing work clothes, tired, but feeling good," wrote one brave volunteer beneath her uploaded picture. "I see my smile, yet again. I also see that my face needs powdering and my eyes are tired."

But is that what other women saw when they looked at her? Some glances were pretty sharply appraising. "She seems to have a bit of acne," one unsentimental member wrote. "Her nose ring doesn't go with the rest of her," wrote another. But more were warmly appreciative: "Bright, happy eyes!" observed on admirer. "Absolutely great smile. White teeth," wrote another. Overall, the "critics" were kinder than the subject.

Is it surprising to learn that young women are harder on themselves than others tend to be? Probably not. But the deeper lesson in this experience is about the positive potential of collaboration – between technologies (mobile vs. online), between consumers and between consumers and brands. If people are this willing to put themselves and their opinions on the line to help brands better understand their consumers, what more might they be willing to do? That's the exciting question.

Reveal the human face

Ultimately what matters is not whether a survey response averages 65 characters or 136. What matters are the relationships between brands and consumers that help reveal the human face of all stakeholders, from marketers and consumers to engineers and distributors. Each of us is a "character" in our own right and in this era of big data, small-scale human connections matter more than ever. The biggest lesson that mobile research can teach us is that consumers are not only willing but eager to partner with brands ... but only if it's a true partnership, rooted not just in clicks or counts, but in, well, character.

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mobile research

Resistance is futile

10 reasons why you should go mobile right now

| By Bob Yazbeck and Susan Scarlet

snapshot

The authors offer a mobile research manifesto, addressing some common complaints against mobile and outlining the many factors in its favor.

Winston Churchill once said, "I never worry about action but only inaction." It's easy for us to sit at our computers or across from colleagues in conference rooms discussing how to cope with change. But in doing so, we may be missing out on the world outside our door. Step over the threshold and there it is: The mobile world awaits us. And while we thrive in this world as consumers, apprehension takes over as we wrestle with how we'll thrive as researchers.

But why all the skepticism, particularly when the signs are evident? Online panel churn is increasing, participation rates are decreasing and respondents are more selective with their increasingly fragmented time. Is it because we're historically slower to adapt as an industry? Is it that we're stuck in the status quo of online data collection? Or, is it because we're frozen in an "inquisition-first" mind-set?

We had front-row seats in the landline-to-PC revolution and one thing's for sure: The mobile revolution stands to yield far more dramatic impact on how we learn from consumers. It's time to let mobile permeate our world and push ourselves to reimagine our craft. Whether it's snack-size surveys, mobile ethnography or app-based communities, here are 10 reasons you need to turn inertia into impact.

1. It's not mobile research, it's research in a mobile world. It's important to know that mobile is not simply an iteration of research the way we've always done it. We are, in fact, in the business of market research and the market has changed. Today, one-quarter of survey respondents prefer to participate via their mobile devices. Millennials stand to abandon research altogether unless it's mobile-friendly and device-agnostic – let's not mess it up with them. Since this group incorporates mobile into their digital fluency, researchers need to be equally fluent in our survey design. With nearly 1.82 billion smartphones in use worldwide by the end of 2013, the numbers speak for themselves.

2. Nothing new is easy. The shift from mail and phone to the Internet had plenty of painful moments. We distinctly remember that sinking feeling when data went missing due

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to programming errors; or worse yet, having to prove to clients that respondents weren't just teenagers posing as adults. The phrase "no pain, no gain" applies here yet again. It's better to get our war wounds now. Write your next survey with mobile in mind – keep it under 10 minutes, use five-point scales and test the heck out of it with your internal posse. Or consider fielding an existing online survey with a small group of mobile respondents and you should find what we've found: similar results. Take small steps to build your mobile repertoire while you can still operate in skunk-works mode.

3. Consumers have the upper hand. There's a reason why Apple puts "i" in front of its products – you may think it's for "Internet" but "i" is really about the "me." From BMW Mini to Birchbox to Coca-Cola Freestyle, businesses are tailoring their products to buyers. And guess what? Now they're spoiled. They expect to provide feedback on their terms too. Mobile devices are now part of those terms because they are always within reach. With 70 percent of shoppers using smart devices in-store, research better be ready to step into the aisle. Marketers instinctively know this – researchers need to hone their instincts too.

4. Mobile breeds authenticity. How do we know respondents are reflecting an uncensored "version of self" when participating in research? Although neuroscience-based research may lead us to that answer, we have no way of knowing for sure. Yet, there is evidence that mobile holds promise. Through investigatory research conducted by our colleagues in 2011, we learned that respondents frequently self-censor in social networking environments. This occurs, in part, because they want to project the best version of themselves. Though their inclination is to suppress their true thoughts and admissions, the smartphone appears to change that. As a conduit of spontaneity, the smartphone catalyzes a more authentic version of self.

Not so surprisingly, our research also found that respondents in private online communities operate similarly. They are more willing to be forthright in a controlled, non-judgmental environment with like-minded folks who aren't part of their social sphere. Add a layer of mobile onto that and neuroscience may not be worth the wait.

5. Mobile places us there. Mobile brings us full circle with the ability to both observe and inquire. We lost touch with the personal nature of in-person surveys due to more expedient methods brought about by technology. The computer distanced us even further from consumers. Instead of capturing real-time behavior, we ask consumers to recall their experiences. Ironically, smartphones are going to bring us back to consumers. They enable us to not only observe consumers' whereabouts and patterns through geolocation, geofencing and mobile analytics but also to ask them for feedback via mobile surveys. And with mobile ethnography, we'll be able do both, albeit one consumer at a time. All the while, we can maximize the capture of "passive" data. Marketers are obsessed with point-of-sale. Isn't it time for researchers to be obsessed with point-of-experience?

6. It doesn't have to cost more. The Internet currently holds a tenuous price advantage over mobile on a cost-per-complete basis. This is a convenient argument for the holdouts unwilling to embrace mobile. A brief history lesson, and a look at market forces, should convince skeptics that mobile will ultimately become the dominant data collection method.

When the Internet began gaining momentum in the mid-1990s, it wasn't less expensive than mail or phone. Paper, printing and postage were cost-efficient at that time (stamps were 25 cents a pop) and call centers were a dime a dozen. Then came the Internet revolution. As connection speeds got faster, computers got friendly and people grew comfortable with e-mail, respondents migrated online. Savvy researchers took advantage by building online panels and survey software that made it convenient for respondents to share their opinions. Look what happened – they stopped answering the phone and replying to mail, relegating those methods to second-tier status.

Fast-forward to today and a similar pattern emerges, indicating the inevitable dominance of mobile's pricing power. Sales of mobile devices have surpassed the PC. Text and instant-messaging prevail. Surveys are being taken on mobile devices whether we like it or not. Online panels lack diversity, skewing older white female, while mobile skews young and multicultural. Again, savvy researchers are on top of it – building mobile-only panels, connecting through push notifications and QR codes and modifying surveys to optimize the mobile experience.

Sure, cost-per-complete for online research is at an all-time low but does anyone believe it's sustainable?

7. It doesn't have to be 100-percent proven to be valuable. Rigorous research-on-research indicates that mobile provides valid results and yields comparable findings to online surveys. Of course, this is when utilizing reasonable survey length, simplified quant and ad hoc studies (no trackers). However, we know the purists out there still won't be convinced until everyone has a data plan.

We have to admit that market research has never been 100-percent accurate. The potential for bias is always there – with sample selection, poorly-written questions, fatiguing surveys, contextual factors and just plain lack of respondent recall. Knowing this, you think we'd cut mobile a bit of slack and get on with it. If you are truly concerned, start small and call it your beta phase. But continue to put rigor around it – analyze mobile responses to verify the similarity of your data. We're not asking you to give up the science of research, we're asking you to get with the times.

8. Mobile is pervasive and ubiquitous. Consumers spend 2.5 hours per day entrenched in their mobile device. Much of that time is spent filling small increments of downtime – scanning social media, quick-fix gaming, Instagramming a photo. Market research has a golden opportunity to insert itself into these moments by offering convenient and engaging research activities. Who wouldn't want to share their opinion if it was quick, painless and rewarding?

Because mobile plays out in so many layers of consumers' lives, it has the opportunity to bring variety and intrigue to the research process. Video diaries and live ethnography are two ways we've begun to do this.

The most fully-realized application of mobile, to date, has been with online communities. We build trusting and enduring relationships with respondents and offer them multiple ways to immerse with our objectives. For example, a pet-owner community encourages respondents to share experiences when they change their brand of pet food, board their pet, visit the vet or any other moment they deem significant. They often enhance their feedback through imagery and video. Judging by the popularity of pet videos on YouTube, you can bet our clients have lively show-and-tells when delivering the findings!

9. Mobile is global. Though per-capita smartphone sales in developed countries exceed the rest of the world, in some ways we trail in realizing mobile's application in our lives. Because of this, our mobile fluency has suffered, hampering researchers from taking advantage of our global potential.

High penetration of landlines and cable, and the ease of obtaining service, is holding us captive. Countries with high mobile IQs leapfrogged ports and cable due to bureaucratic gridlock and the high cost of PCs and went straight to wireless. Since most of us in the Westernized world have the luxury of home computers, mobile is less of a need when access to the Internet is readily available in the comfort of our homes.

Out of necessity, the smartphone has become a survival tool – the Swiss Army knife of the less-developed world. A primary example is the different comfort levels using the smartphone as a mobile wallet. What is slowly and carefully being rolled out in the U.S. has already been embraced for several years in developing countries.

Even within U.S. borders, smartphones are an important device among Hispanics and African-Americans, as these groups have higher adoption rates than the general population. According to Pew Research, the biggest driver of this spike among Hispanics is technology adoption among foreign-born Latinos and Spanish-dominant Latinos.

10. Smaller is better. There's a reason why this is the last point, as it will be the most difficult adjustment for researchers to make. Why? Because it requires a conscious decision to abandon lengthy surveys and in-person groups as we know them today. Flourishing in tomorrow's world means that long, monotonous questionnaires and drawn-out sessions will become a thing of the past.

The legacy for surveys will be in our ability to offer them up as snack-size servings. Today, we're calling them modular mobile surveys. In fact, in 2012 we worked hand-in-hand with SSI and a beverage manufacturer to redesign a previously-fielded 30-minute AA&U survey. Broken down into three 10-minute modules, we offered respondents the option to complete the second module and then the third. With over 70 percent of respondents completing all three modules, we averted our concerns of serving up our questions in edible-sized chunks.

And, as we alluded to earlier, live mobile ethnography will replace the need to pull consumers into carefully orchestrated roundtable discussions. Faster streaming and dual cameras will allow researchers to effortlessly and instantly engage with consumers wherever they are.

The smaller and smarter mobile devices get, the more likely our research will be carried into consumers' worlds.

Get on the freeway

It's going to be a long road until we collectively feel secure about conducting research in a mobile world but the very notion of security should not be the thing holding us back. We're not asking you to go from zero to 60 today but we are asking you to get on the freeway with us. Join us and our industry colleagues who see opportunity to evolve our discipline – and our way of thinking.

To quote Churchill once again, "A pessimist sees the difficulty in every opportunity; an optimist sees the opportunity in every difficulty."

Don't let the inevitable roadblocks prevent you from the opportunity that lies ahead. Go ahead and step outside your office ... the mobile world awaits you!

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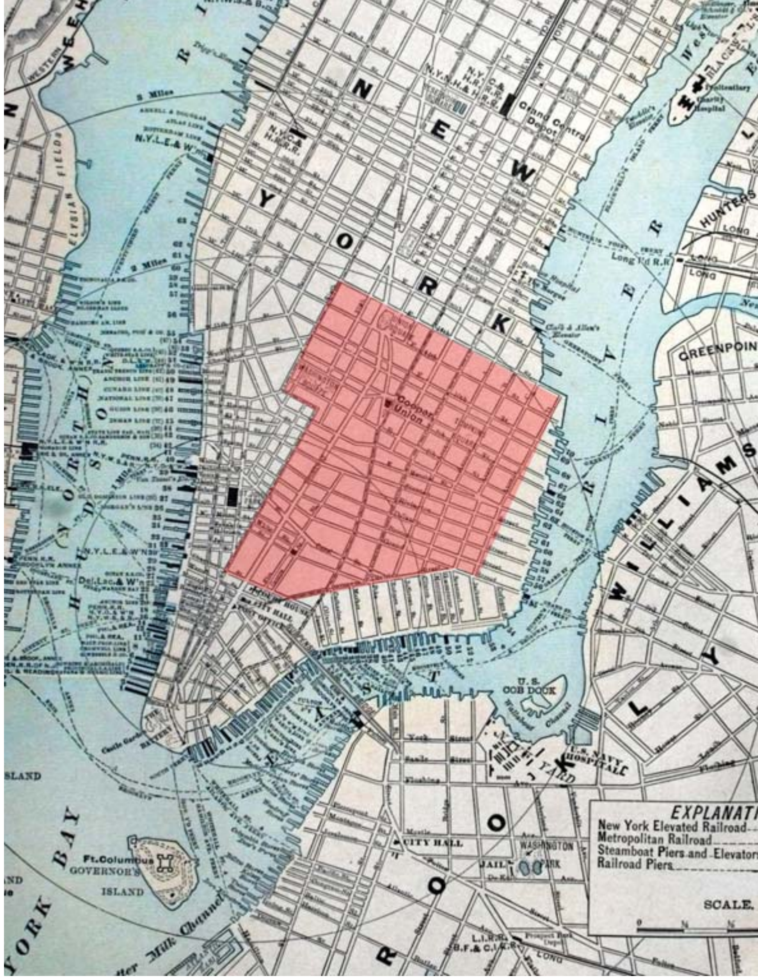

••• mobile research

Right place, right time

Why geofencing is the next mobile market research must-have

| By Allen Vartazarian

snapshot

Survey apps that react to a respondent's location are full of potential, as long as the problem of battery drain doesn't sap their promise

In 2011, mobile was considered an emerging data collection method. Since then, the market research industry has overcome the challenges of high cost and limited reach and witnessed a surge in mobile research adoption. More sophisticated technology and affordable pricing increased smartphone penetration. Additionally, mobile as a mode for data collection could go where in-person, telephone and online research could not go – engaging respondents to gather in-the-moment insights. Mobile presents researchers with a unique opportunity to think beyond the existing quantitative and qualitative techniques and explore creative ways to obtain actionable consumer data for businesses.

The promise of mobile is on-demand and in-the-moment access for consumers anywhere, anytime. As of 2013, mobile devices have greater consumer penetration than PCs, high-speed Internet and even television. Over 92 percent of American consumers carry a mobile device and over 52 percent of those are smartphones equipped with geolocation technology.

For market researchers, these figures represent unprecedented access to consumers. By capturing consumers on-the-go, researchers can more accurately gauge customer experience with products, events and services while they are happening instead of having to rely on feedback at a later time.

A virtual fence

Key to this in-the-moment ability is something called geofencing, which is technology that allows the creation of a virtual fence around a geographic location. Smartphones that are location-enabled can detect when someone enters or exits these fences, which can be as large as a city block or as small as a retail store. As soon as a person crosses into one of the fences, notifications ranging from real-time deals to vendor-specific surveys can be triggered.

Though researchers can be detailed about defining the criteria for each geofence, there are certain technical limitations in the way that a smartphone determines your location, especially

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when the device is not actively being used (like when it's in a bag or pocket). Nonetheless, through geofencing, researchers can set an acceptable location accuracy threshold when attempting to underzstand a consumer's proximity to a location.

Variety of insights

Geofencing technology can be leveraged by market researchers, retailers, CPG companies and advertisers to gain a variety of insights. These insights can include on-site quality audits, product awareness and ease of locating the product and out-of-home advertisement effectiveness.

Here are some of the top applications of how geofencing is advancing mobile market research:

Out-of-home ad effectiveness. By setting geofences around out-of-home advertisements, market researchers can tell when consumers are nearby and potentially exposed to the ad. By setting geofences around specific businesses, agencies can better gauge ad effectiveness by comparing store visitation of exposed consumers to those who were not exposed.

Real-time feedback. Whether it is a trip to the grocery store or going to see a movie that just came out, it's imperative to gather feedback as close to the time of the experience as possible. With geofencing, market researchers can trigger an alert as someone enters or exits a location with an invitation to answer a few questions while the experience is still fresh in their mind.

Behavior monitoring. Geofencing can be used to track store visits, time-on-site and other key metrics vital to retailers and advertisers. Combining this with other collected data (i.e., Web browsing and purchase activity) helps identify the true impact of out-of-home ad exposure.

Natural shopper intercepts. In addition to being able to actively prerecruit and drive traffic to a specific location, researchers can catch respondents on-location without the need to prerecruit. With geofencing technology researchers can easily intercept natural shoppers as they go about their normal consumer habits in and around retail locations all over the world. Natural shoppers can be enlisted on-demand, informing metrics such as ease of locating a product, in-store ad effectiveness, shopper intent to purchase, etc. The data collected inside the geofence acts as the store intercept.

Competitive analysis. By setting geofences around the locations of a company's competitors, researchers can obtain data to understand what factors motivated someone to visit one store over another.

Field research. As an alternative to the in-person field when a respondent is leaving a mall or a movie theater, with geofencing, market researchers can identify and ping consumers to participate in a certain action as soon as they exit any location, making this a much more scalable solution for capturing valuable insights.

Battery drain

Most talk about mobile optimization tends to focus on responsive design and customized content. Consumers expect mobile Web sites to not only be geared toward their eyes and thumbs but also to their tablets and their various operating systems. Yet even as companies continue to explore and invest more in mobile, there has been little discussion about one of the key issues that could make or break the experience as a whole, especially as it pertains to the market

Research Company Spotlight - Mobile Surveys

Below is a list of firms from our Researcher SourceBook™ specializing in mobile surveys.

Authentic Response, Inc.
1-888-AR-PANEL
www.authenticresponse.com

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

Blackstone Group
312-419-0400
www.bgglobal.com

blueocean market intelligence
602-441-2474
www.blueoceanmi.com

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

cluetec GmbH » SEE AD p. 53
49-721-831790
www.mQuest.eu

Critical Mix
401-949-4010
www.criticalmix.com/

DataPrompt International
312-423-4100
www.dataprompintl.com

Decipher » SEE AD p. 49
800-923-5523
www.decipherinc.com

Discovery Research Group
800-678-3748
www.discoveryresearchgroup.com

eCGlobal Solutions
786-269-0377
www.ecglobalsolutions.com/

FOCUSCOPE, Inc.
708-386-5086
www.focuscope.com

Gongos Research
248-239-2300
www.gongos.com

Harmon Research Group, Inc.
714-280-0333
www.harmonresearch.com

Insights in Marketing
847-512-9840
www.insightsinmarketing.com

Jibunu LLC
978-537-5510
www.jibunu.com

Kinesis Survey Tech., LLC » SEE AD p. 51
512-590-8300
www.kinesissurvey.com

KL Communications, Inc.
732-224-9991
www.klcommunications.com

Locately
617-501-3544
www.locately.com

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

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

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

NewMR
749-5926-8546
www.newmr.ru/en/

OMI » SEE AD p. 50
7-499-978-5197
www.omirussia.ru

OnePoint Global
646-216-2032
www.onepointglobal.com

Opinionmeter International
510-352-4943
www.opinionmeter.com

Paradigm Sample™
877-277-8009 x100
www.paradigmsample.com

PinPoint Research
510-463-6710
www.pinpointresearch.com

PollBuzzer
917-750-7196
www.askpollbuzzer.com

QuestBack Group, Inc. » SEE AD p. 55
203-690-1052
www.questback.com

Research Now » SEE WRAP
888-203-6245
www.researchnow.com

Revelation Global » SEE AD p. 9
503-388-6012
www.revelationglobal.com

The Sentry Marketing Group, LLC
214-295-2615
www.sentrymarketing.com

SmartRevenue
203-733-9156
www.smartrevenue.com

SSI » SEE AD BACK COVER
203-567-7200
www.surveysampling.com

Toluna
203-834-8585
http://us.toluna-group.com/

TyHann Market Research
972-740-0673
www.tyhann.com

uSamp™ » SEE AD p. 7
888-618-0292
www.usamp.com

Voxco (Voxco Group)
514-861-9255
www.voxco.com

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

research industry: battery drain.

Any app that uses your device's location will cause battery drain. The more frequently that app searches for location, the more battery life it will sap. No one is more aware of this than the mobile carriers themselves. Verizon just issued a warning to its customers about high-risk apps. We can only expect these types of alerts to increase as more apps involve battery-sapping geolocation technology.

As firms start turning out research apps in the rush to accommodate the latest and greatest mobile technological advancements, it becomes even more critical to ensure quality. Before running a geofencing project, be sure to ask the technology provider what steps they have taken (if any) to preserve battery life and then download their app so you can experience it yourself. If apps are draining batteries, the quality of the research can be compromised. The industry is responsible for ensuring a positive experience for all respondents, regardless of the device.

A more dynamic experience

Mobile market research is blurring the lines between qualitative and quantitative methodologies. Thanks to ubiquitous cameras and microphones, most mobile devices let consumers capture feedback in their own words. Researchers can now create a more dynamic user experience by building barcode scanning, photo, video and audio features into their surveys. The rapid adoption of mobile apps that encourage the use of cameras and photo-sharing (i.e., Instagram) is proof that users are comfortably conditioned to snap a photo for surveys as well, whether at a grocery store or in the intimacy of their own home.

By combining geofencing technology with rich-media capabilities, researchers will have unprecedented access to audiences in real time. However, as with the adoption of any new technology, it is critical for researchers and project management teams to understand a respondent's interaction with and usage of a smartphone. Equipped with this knowledge, they can set realistic expectations, effectively target relevant audiences and encourage higher engagement rates. All of this will ideally result in more accurate and insightful data.

For the better

The market research world sits at the nexus of technology proliferation, consumer conditioning and willingness to engage. Mobile, through the combination of location-based technologies and quali-quant methodologies, is revolutionizing the research landscape rapidly and irrevocably for the better.

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●●● questionnaire design

A more informed process

How cognitive interviewing can improve your questionnaire design

| By Linda Naiditch

snapshot

Examples from a study about nutrition help illustrate the clarifying value of cognitive interviewing when crafting survey questions.

You don't know what you don't know. This truism often lurks in my mind as I am designing a questionnaire. I feel it is my job to ask just the right questions so that my clients can obtain the information they need. But I can't be sure if I have hit the mark if I do not know how respondents will understand and interpret my questions. Perhaps the best way to illustrate my concern about the unknown is to ask you to imagine what would happen if:

- respondents don't see an answer that reflects their thinking in a list of response options to a particular question;
- a listing of attributes does not include all of the factors that would be relevant to the client's objectives;
- respondents think a term means something different than what you intended;
- respondents completely misunderstand the thrust of the question; or
- you just didn't think of something and leave out what would be an important component to the study.

Well, the simple answer is that the results you deliver to clients would either be incomplete or based on suboptimal data that you thought was just fine.

Researchers currently use a variety of methods to try to avoid these problems, including: having research colleagues review the draft questionnaire; conducting qualitative research before moving on to the quantitative research; and conducting and monitoring pre-test interviews. Each of those methods can help. But even when we use all three methods, our questions can still be off-target, incomplete or worded in a way that is not effective because there is still something that we don't know.

Research colleagues who help us with their expert review can often see gaps and help fill them in. But we and our colleagues often have very different life experiences from the subjects

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With over 25 years of commitment to *quality* and *service*, let us help you **navigate** the market research industry.
GENESYS for all your research sampling needs.
PRO-T-S *research* Predictive dialers.
ARCS IVR, Web and Panel Management.
www.m-s-g.com
Phone 800.336.7674
Fax 215.653.7115
755 Business Center Drive, Horsham, PA 19044
Marketing Systems Group

Figure 1

When you are deciding whether to buy a particular food, how important, if at all, is each of the following?

		Not at all important	Not too important	Somewhat important	Very important	Not sure
a.	a. Trans fat content	1	2	3	4	5
b.	b. Total fat content	1	2	3	4	5
c.	Mono- and poly-unsaturated fat content	1	2	3	4	5
d.	Saturated fat content	1	2	3	4	5
e.	Omega-3 content	1	2	3	4	5
f.	Omega-6 content	1	2	3	4	5

who will be completing the survey, so we cannot think like them or imagine every situation that may apply to them.

Preceding quantitative research with qualitative research is very helpful in guiding the development of survey questionnaires. But when we have finished our draft questionnaire, we still do not know if we have hit the mark.

Telephone pre-tests have the potential to reveal a variety of issues but their effectiveness is dependent on respondents being willing and able to communicate their misunderstanding to the interviewer and on the researcher being extremely sensitive to hesitations and other subtle signals of problems. We cannot count on all respondents cuing us to problems in the questionnaire – they may even be unaware that their understanding of the question is different from what was intended.

We see its value

Where does that leave us? With the need for one additional tool: cognitive interviewing. Our firm has used this approach for a number of years and every time we use it we see its value in making sure we are measuring everything we want to measure and that we truly understand what respondents have told us as we analyze the data.

Cognitive interviewing is a specialized type of pre-test that focuses on respondents' thinking process as they hear or read questions in a survey. It actively delves into how they interpret the meaning of questions and possible responses, what they think about when they are considering how to answer, how they decide on their answers and what their answers mean.

In our firm we have conducted cognitive interviews over the telephone and in person for surveys that will be administered by telephone as well as self-administered online surveys. Our methods are primarily drawn from Gordon B. Willis' *Cognitive Interviewing: A Tool For Improving Questionnaire Design*. These methods include:

- asking respondents to rephrase the question, or the response options, in their own words;
- asking them to tell the interviewer what they are thinking as they consider the question, consider their answer and decide upon their actual response;
- asking respondents what specific words or phrases in selected questions mean to them;
- asking how easy or difficult a question is to answer and if it is not easy, to probe for the causes of difficulty;
- looking for any cues that may indicate an issue, including hesitation or information provided in one question that seems to conflict with the information provided in another.

In addition, we sometimes ask respondents how they would answer a pre-coded question before they have seen the response options, to ensure we have presented all relevant categories. We may also repeat a question with slightly different wording later in the questionnaire to see if it elicits a different response. If we hear responses that seem inconsistent, we probe for the reason why. We observe and listen for nonverbal cues that a respondent is having difficulty or is confused.

A few examples of cognitive interviews that we conducted on a recent publicly-released survey about nutrition illustrate their value. In a survey about nutrition, one trend question asked respondents to rate how much impact factors such as taste, price, healthfulness and sustainability have on their food selection. With our understanding that "sustainability" can connote ecological, economic and social aspects of food production and sales, and knowing that a surprisingly high proportion of the population reported in a past study that it significantly impacted their food purchase decisions, we decided to explore the concept in our cognitive interviews.

A young woman named Angie explained that, to her, sustainability meant how long food would remain fresh if she put it in the freezer. Similarly, a middle-aged male thought it related to a food's shelf life. With such different meanings to different people, the term would not be useful.

Later, in a cognitive interview with a middle-aged man named David, we posed the question shown in Figure 1 from the same draft questionnaire.

In explaining his answers to this question, David noted that some of the food components listed are good to include in one's diet, such as omega-3s, while others such as trans fats and saturated fats are bad. When we initially drafted the question, we expected it would measure how much weight, if any, respondents placed on these ingredients, regardless of whether they are good or bad for one's health. David, however, chose the "very important" option when he wanted to indicate that a food component was a good one that he sought to include in his diet and "not at all important" to convey the component was something bad to be avoided.

David's thinking prompted us to revisit this question in depth with the client and we ultimately separated the question into two parts. The first asked yes/no whether the respondent considered whether the foods they purchased contained these types of fats, then a follow-up question was posed to learn whether the respondent was seeking to consume or avoid each one.

Finally, one more example from David's interview.

To the best of your knowledge, is your blood pressure...

1) High or higher than normal
2) Normal (or in the normal range)
3) Low or lower than normal
4) Not sure

David responded to this question with a question to us: "How should I answer if my underlying blood pressure is high but it is normal because of medication I take?" That was a forehead-slapping moment where we knew we needed two versions of the "normal" response option – one "without medication" and one "with medication." The revised question turned out to be very useful in analysis of differences between subgroups of respondents.

Flashes of insight

These are just a few examples of ways in which cognitive interviewing can help improve a draft questionnaire. The interviews help immensely in the refinement of what you have down on paper already but they also sometimes give you flashes of insight, golden nuggets of understanding that result in changing your approach to a given line of questioning. In particular, cognitive interviews offer the following benefits:

- They can reveal when you are off-target in your inquiry.
- They can identify when you are missing a dimension that is integral to respondents' thinking.
- They help you word questions and response options in a way that is meaningful and unambiguous to respondents.
- They reveal when respondents have underlying assumptions that affect their responses and suggest ways to address the issue.
- They help you write questions so that they can be answered more easily and more accurately.

In addition to helping you improve your questionnaires, cognitive interviews provide objective evidence that helps market research firms to back up constructive criticism of client-worded questions.

Just a handful

If you are considering trying out cognitive interviewing, you likely will be wondering how many interviews one needs to conduct. The good news is that just a handful can often be extremely impactful. We have found that as few as five make a big difference. However, your chances of catching all the problems with your questionnaire rise in linear relation with the number that you conduct, according to a study outlined in "Sample size for cognitive interview pretesting" in the winter 2011 *Public Opinion Quarterly*. Willis himself recommends three rounds of cognitive interviews, each with 10 interviews.

The bottom line is that whenever a project timeline and budget allow, we try to include cognitive interviewing as part of our proposed questionnaire design process. We like having this technique in our toolbox and we think if you try it, you will too.

Linda Naiditch is assistant vice president at Mathew Greenwald & Associates, a Wash., D.C., research firm. She can be reached at lindanaiditch@greenwaldresearch.com.

Names of Note

■ *The Connell Group*, a Montvale, N.J., research firm, has named **Phillip Barone** vice president for strategic insights and consulting. In addition, the firm has added **Ali Sheffield** and **Connie Torres** as director of strategic insights.

■ U.K.-based *Insight Research Group* has tapped Research Director **Damian Eade** to head its new digital business team.


Eade

■ Denver-based *iModerate Research Technologies* has added **Mike Israel** as senior vice president of sales.

■ *SQAD*, a Tarrytown, N.Y., media cost forecasting firm, has promoted **Samantha Marlowe** to vice president of regional sales.

■ *Schlesinger Associates*, Iselin, N.J., has named **Robert Ramirez** senior vice president, strategic development for Schlesinger's Global Management Solutions service in the U.S. **Tim Holley** has joined Schlesinger Associates as director, specialty panels and recruiting.

■ *OTR Global*, a Purchase, N.Y., investment research and agency-trading boutique, has named **Mark Conley** director of research.

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■ Philadelphia research firm *Focus Pointe Global* has named **Robert Stephens** chief technology officer. He will be based in Atlanta.

■ *Market Strategies International*, Livonia, Mich., has added **Keith Bossey** as a senior vice president of research and consulting in the financial services division.


Bossey

■ Research firm *Hall & Partners* has appointed **Ashley Walker** global marketing and communications director, based in London. In the firm's New York office, **Jim Forrest** has been appointed global partner, digital innovations.

■ **Erik Forsell** has been named chief marketing officer of *Mammoth Mountain Ski Area*, Mammoth Lakes, Calif.

■ Cincinnati-based *DunnhumbyUSA* has promoted **Jack Engle** to senior vice president, global products and services and named **Ernest Leffler** vice president, global infrastructure, and **Michele Weissman** vice president, client solutions.

■ **Dean Wiltse** has joined *FashionPlaytes*, a Beverly, Mass., firm that maintains an online community for 5-to-12-year-old girls, as CEO. **Dana Stanley** has been named vice president of research.

■ **April Jeffries** has stepped into the role of president of *Ipsos UU*, the qualitative research arm of Ipsos Marketing, in the United States. She is based at Ipsos' office in Mahwah, N.J. Separately, **Jeff Cail** has been named chief operating officer for Ipsos in North America. **David Parma** has joined as president of Ipsos Marketing in the United States. And **Jim Meyer** is the newly-appointed CEO North America for Ipsos ASI.

■ *Cambiar*, a management consulting firm focusing on the research industry, has appointed **Russ Rubin** as an associate in its research impact practice.

■ Encino, Calif.-based *uSamp* has named **Carl Trudel** chief technology officer.

■ London research firm *Double Helix* has named **Diana Tan** and **Julie Kang** to its Singapore-based APAC market research team.

■ **Rachelle Deshaies** has been appointed executive vice president and managing director of the Toronto office of *Leger – The Research Intelligence Group*.

■ U.K. health care research agency *Insight Research Group* has hired Research Director **Kyrie Andersen** to join its quantitative research practice, which it markets as IQ.

■ *MarketVision Research*, Cincinnati, has promoted **Peter Verrill** to senior research associate and **Anna Waitas** to research manager. **Abigail Miller** and **Keith Romer** have been named research associates assigned to the online qualitative team. In addition, **Chad Davis** has joined the company as a vice president in the Cleveland office.

■ *Millward Brown* has appointed **Travyn Rhall** as global CEO, succeeding **Eileen Campbell**, who is stepping down in mid-July for personal reasons.

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Research Industry News

News notes

■ In May, Oana Stroie revealed herself to be Angry MR Client, whose candid and anonymous Twitter posts earned an enthusiastic following in the research industry. Currently serving as commercial manager, Europe, at London research firm **Face**, she posted her thoughts on the decision to end her anonymity in a blog post at http://tinyurl.com/n2hlkxd.

■ Following an article, "Switch on and you become a goldmine," published May 12th in London's *Sunday Times*, **Ipsos MORI** issued a statement saying it "absolutely refutes the suggestion that it is offering access to individual personal data for sale." The article detailed a trial run, held last summer, of a program under which Ipsos Mori, as part of a deal with EE – a mobile phone company formed in 2010 from a merger between Orange and T-Mobile – was allowed to monitor the habits of millions of EE phone customers. The research firm was "delighted with the results," said the article. In a statement of response, Ipsos MORI said: "In the cutting-edge research that Ipsos MORI is doing with EE, the U.K.'s largest mobile operator, our mobile analytics explore user volume, demographics and mobile Web use from anonymized and aggregated groups of people. In conducting this research we only receive anonymized data without any personally identifiable information. We have taken every care to ensure it is being carried out in compliance with all relevant legal and regulatory requirements, including the Data Protection Act and Privacy and Electronic Communications (EC Directive) Regulations (both as amended). In particular, we can make the following assurances: Ipsos MORI only receives anonymized data without any personally identifiable information on an individual customer. We do not have access to any names, personal address information, nor postcodes or phone numbers. We can see the volume of people who have visited a Web site domain but we cannot see the detail of individual visits nor what information is entered on that domain. We only ever report on aggregated groups of 50 or more customers. We will never release any data that in any way allows an individual to be identified."

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■ **SSI**, Shelton, Conn., has been designated as a preferred provider in the Microsoft Preferred Supplier Program.

Acquisitions/transactions

■ **Market Strategies International**, Livonia, Mich., has acquired **Cogent Research**, Cambridge, Mass.

■ **Yahoo!** has acquired social media polling service **GoPollGo**. Terms of the acquisition were not disclosed. As part of the deal, Yahoo! has closed down the service and its team has joined Yahoo! Mobile in Sunnyvale, Calif.

■ **Aegis Media** announced the expansion of its iProspect global digital performance agency with the acquisition of **nvi**, a performance marketing strategy firm with offices in Montreal and Toronto. The nvi acquisition will increase Aegis Media's Canadian digital revenue by 15 percent and by as much as 33 percent in the Quebec market.

■ Jupiter, Fla.-based **3Q Global** and **Quick Test/Heakin**, as well as Salt Lake City-based **Discovery Research Group**, formerly part the MVL Group, have been sold to Morgan Investors. The companies will retain their existing management groups.

■ **IMS Health**, Danbury, Conn., has acquired **Semantelli Corporation**, a Bridgewater, N.J., social media analytics company, to extend its marketing and consumer engagement capabilities for health care organizations. Semantelli offers cloud-based tools that automate the collection of health care-specific social media content.

■ London ad agency **WPP PLC** said its wholly-owned operating company **TNS** has agreed to acquire **Sinotrust Market Research**, a market research and consulting company in China, from **Experian PLC** for an undisclosed sum.

■ New York-based **Radius Global Market Research** has acquired **Profile Marketing Research** to expand its independent market research networks. Profile will maintain its brand name and office in Lake Worth, Fla. Financial details of the transaction were not disclosed.

■ **GfK**, New York, has acquired **Paterson Consulting**, an Australia agricultural insights firm, and has established new offices in Sydney and Melbourne for its animal and crop health team. The new, Melbourne-based team includes Will Paterson, previously managing director of Paterson Consulting. Bob Sloane, who previously headed agricultural market research at another agency, will lead GfK's business from Sydney. Both are now directors of animal and crop health (ACH) for GfK in APAC. In addition, Stephen Wentworth will serve as senior research manager of ACH in the region.

Alliances/strategic partnerships

■ **Crimson Hexagon**, a Boston social media analytics software firm, has partnered with **MicroTech**, a Tysons Corner, Va., services provider and technology integrator, to allow MicroTech to use Crimson Hexagon's ForSight platform to provide clients with social data and knowledge management.

■ Vancouver, B.C.-based **Vision Critical** and **Research Now**, Plano, Texas, have partnered to provide Research Now clients and prospects with Vision Critical Insight Communities.

Also, Vision Critical has partnered with China-based **N Dynamic Market Research and Consultancy**, allowing N Dynamic to offer Vision Critical's insights community technology to its clients and prospects across Hong Kong, Taiwan and Mainland China.

Elsewhere, Vision Critical Germany has partnered with research agency **SKOPOS Germany** to allow SKOPOS Germany to offer Vision Critical Insight Communities to its client base while SKOPOS Germany's research experience will be added to Vision Critical's market offer.

■ Australia-based **Effective Measure**, a digital audience profiling and measurement firm, has marked its official entry into the online media market of Pakistan by supporting the Pakistan Advertisers Society Awards in April and by hosting a series of briefings with key clients. Leading Effective Measure's expansion in Pakistan is Country Manager-Pakistan Imtiaz N. Mohammad.

■ **Volume**, a U.K.-based integrated communications and innovation agency, has partnered with U.K. online research and custom panel firm **EasyInsites** to provide B2B research services to its clients.

■ **Crown Media Family Networks**, home of Hallmark Channel and Hallmark Movie Channel, has acquired a license to the data from Cincinnati-based **Nielsen Catalina Solutions**' CPG Buyer Segments, a syndicated offering that provides purchaser-based segments on over 2,300 categories and brands. Hallmark plans to use the new capability in the 2013/14 upfront television negotiations to improve the fit of its television inventory to advertisers' purchaser-defined segments.

■ **MetrixLab**, the parent company of San Francisco research firm MarketTools, has reached an agreement with **Precision Sample**, Denver, to acquire a strategic ownership position in the company. The companies will work together in 2013 to integrate Precision Sample's panels into MarketTools' panel-agnostic sample ecosystem.

Association/organization news

■ **The Marketing Research Association** (MRA) announced the results of its annual board of directors election. **Jill Donahue**, senior brand insights manager, Nestle Purina PetCare, will serve as MRA's 2013-2014 chairman. Joining Donahue on the executive committee will be: **Debby Schlesinger-Hellman**, executive vice president, Schlesinger Associates Inc. (immediate past MRA chairman); **Ted Donnelly**, managing director, Baltimore Research (MRA vice chairman); **Vaughn Mordecai**, president, Discovery Research Group (MRA treasurer); **Dan Womack**, senior manager, insights, Aflac (MRA secretary). The following industry professionals additionally will serve on MRA's board as directors: **Scott Baker**, president, Adept Consumer Testing; **Janet Baldi**, senior vice president, RTi Research; **Jim Bryson**, CEO, 20/20 Research Inc.; **Jerry Haselmayer**, CEO and co-owner, SEEK Company; **Jeffrey Henning**, president, Researchscape International; **Elizabeth Merrick**, manager, HSN.

Awards/rankings

■ **The American Marketing Association** (AMA) and the **American Marketing Association Foundation** (AMAF) announced **Herb Sorensen** as the recipient of the 2013 Charles Coolidge Parlin Marketing Research Award. This award recognizes Sorensen's "substantial contributions and unwavering dedication to the ongoing advancement of marketing research practice."

■ New York-based **Analytic Partners**, a marketing analytics firm, was cited as a Leader in **Forrester Research Inc.**'s The Forrester Wave: Marketing Mix Modeling, Q2 2013 report.

■ Mountain View, Calif., media television and video analytics firm **Ace Metrix** has been awarded a place on the Red Herring 100 North America list, which honors the year's most promising private technology ventures from the North American business region.

New accounts/projects

■ New York researchers **Focus Forward** and **Panel Direct** have chosen U.K.-based **MARSC Limite**d to deliver its MARSC panel management, sampling software and community system. The Focus Forward contract requires the build of a new portal Web site along with a database build.

New companies/new divisions/relocations/expansions

■ **ActusMR Inc.**, a Fort Worth, Texas marketing research sales consulting firm, has rebranded as **Actus Sales Intelligence** and has also launched a division focusing on professional executive sales recruitment.

■ **Delve**, a St. Louis, Mo., research firm, has opened a new office in the Minneapolis suburb of Edina. It features oversized focus group rooms, a test kitchen, high-speed wireless Internet throughout and other amenities.

■ **Lumi Mobile**, a London-based mobile engagement insight firm, has expanded to Asia with the opening of an office in Hong Kong.

■ Health care market research firm the **Research Partnership** has expanded its U.S. operations, establishing offices in Boston, Los Angeles and San Francisco. The firm appointed Christine Naegle (Los Angeles) and Birgit Eschmann (San Francisco) to run the company's West Coast operations. Claire Richardson will head up the Boston office.

■ New York-based research firm **maslansky + partners** has opened European offices, tapping Keith Yazmir, partner at m+p, to assume the role of managing director Europe, Middle East, Africa. He will be based in London and Paris. The respective office locations are: m+p London, 35-41 Folgate St., London E1 6BX; and m+p Paris, 54 rue de Clichy #600, 75009 Paris.

■ **Research Panel Asia**, Tokyo, has opened an office in Singapore at 250 North Bridge Rd., #14-03, Raffles City Tower, Singapore 179101.

■ Seattle firm **Zettics**, a provider of big data mobile analytics, has opened new offices in Europe and APAC. In conjunction, Ken Parkinson has joined the company as vice president of sales for EMEA and Paul Ash has been named vice president of sales for APAC.

Research company earnings/financial news

■ Oslo, Norway enterprise feedback management firm **QuestBack** announced rapid business growth in 2012. The company reported revenue of $49.65 million in 2012, up from $39.86 million in 2011, an increase of 25 percent. Billings during the period increased by 28 percent. The firm reported an EBITDA of $5.33 million in 2012.

■ For the first quarter ended March 31, **Arbitron Inc.**, Columbia, Md., reported net income for the quarter of $16.3 million or $0.60 per share (diluted), compared with $17.8 million, or $0.64 per share (diluted), for the first quarter of 2012. Costs and expenses in the first quarter 2013 included $3.2 million of consulting, legal and other expenses related to the pending acquisition of Arbitron by Nielsen Holdings N.V., which impacted net income by $0.12 per share (diluted).

Excluding the expenses directly related to the pending acquisition, earnings per share (diluted) for the first quarter would have been $0.72 per share (diluted), an increase of 12.5 percent over the first quarter 2012.

For the first quarter of 2013, the company reported revenue of $111.8 million, an increase of 5.1 percent compared to revenue of $106.4 million during the first quarter of 2012. Costs and expenses for first-quarter 2013 were $81.4 million, an increase of $6.2 million or 8.3 percent compared to $75.2 million in first-quarter 2012. In addition to the $3.2 million of expenses related to the pending Nielsen transaction, costs in the quarter increased as a result of planned incremental investments in Arbitron Mobile panels, costs associated with address-based sampling, in-person recruiting and cellphone household recruiting.

EBIT for the first quarter 2013 was $28.0 million compared with EBIT of $28.9 million for the first quarter of 2012. Excluding the costs for the pending Nielsen transaction, EBIT in the first quarter 2013 would have been $31.2 million, an increase of $2.4 million or 8.2 percent compared to the first quarter 2012, yielding EBIT margins of 27.9 percent as compared to 27.1 percent in the first quarter of 2012.

The net pre-tax investment in cross platform initiatives and in Arbitron Mobile during the first quarter of 2013 was $4.4 million, compared to $2.9 million in the first quarter last year. EBITDA was $34.7 million in the first quarter of 2013 compared with EBITDA of $36.6 million in the first quarter of 2012. Excluding the costs for the pending Nielsen transaction, EBITDA in the first quarter 2013 would have been $37.9 million, an increase of $1.3 million or 3.6 percent compared to first-quarter 2012, with resultant EBITDA margins of 33.9 percent versus 34.4 percent in the first quarter of 2012.

■ **Harris Interactive**, Rochester, N.Y., reported fiscal Q3 revenues of $33.6 million, compared to $34.1 million in 2012. For the nine months ending March 31, revenues were $103.7 million, compared to $111 million in 2012. Operating income improved to $1.1 million in Q3, compared to a $0.4 million loss in the previous third-quarter 2012. Year-to-date operating income was $6 million compared to a $2.3 million loss in 2012. In response, the company raised its adjusted EBITDA guidance for the fiscal year ending June 30 to between $14 million and $15 million with a full fiscal 2013 revenue guidance of between $139 million and $141 million.

■ In Q1 2013, **comScore Inc.**, Reston, Va., achieved record quarterly revenue of $68.8 million, up 11 percent from a year ago; GAAP income before income taxes of $0.2 million; and GAAP net loss of $(2.0) million, or $(0.06) per basic and diluted share.

Pro forma first-quarter metrics were as follows: revenues of $67.5 million, up 12 percent from a year ago; non-GAAP net income of $8.0 million, up from $7.5 million a year ago; non-GAAP EPS was $0.22 per diluted share, consistent with the prior-year period; record free cash flow of $16.9 million, up 57 percent from a year ago; adjusted EBITDA of $12.6 million, up from $11.3 million a year ago; adjusted EBITDA margin was 19 percent of revenues, similar to a year ago; on a constant currency basis revenues would have been $0.2 million higher. (All amounts, including implied prior year pro forma amounts, reflect adjustments to exclude Non-Health Copy Testing and Configuration Manager products and are based on management's estimates of the revenues and results of operations of such products. Prior-period amounts have been adjusted to reflect the same assumptions with respect to Non-Health Copy Testing and Configuration Manager products for the purposes of consistent presentation.)

■ **Tableau Software Inc.**, a provider of digital charting tools, announced the closing of its previously-announced initial public offering of 9,430,000 shares of its Class A common stock at the price to the public of $31.00 per share, which included 1,230,000 shares issued upon the exercise in full of the underwriters' option to purchase additional shares. A total of 6,230,000 shares were sold by Tableau Software and a total of 3,200,000 shares were sold by certain selling stockholders. Tableau Software did not receive any proceeds from the sale of shares by the selling stockholders. The shares began trading on the New York Stock Exchange on May 17, 2013 under the symbol DATA.

■ New York-based **Nielsen Holdings N.V.** announced that the secondary public offering of its common stock was priced at $35.01 per share. An aggregate of 35 million shares were to be sold by certain existing shareholders. No shares were being sold by the company in this offering and it was not to receive any proceeds from the offering. In addition, the selling shareholders granted the underwriters of the offering an option to purchase an additional 5.25 million shares at the public offering price less the underwriting discount.

CALENDAR OF EVENTS

can't-miss activities

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.

featured

VeraQuest and **uSamp** will offer a complimentary Webinar, titled "Ensuring Data Quality - A Two-Tier Strategy" on July 24 at 2:00 p.m. EDT. VeraQuest's Peter Gold and uSamp's Lisa Wilding-Brown will co-present. For more information and to register visit https://quirks.webex.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.

IIR will hold its international shopper insights in action event on November 5-7 at the Corinthia Hotel in Prague, Czech Republic. For more information visit www.iirusa.com/insightsintl.

ESOMAR will hold its qualitative research conference on November 17-19 at the Westin Valencia in Valencia, Spain. For more information visit www.esomar.org.

The Mystery Shopping Providers Association will hold its annual Asia-Pacific conference on November 18-20 in Singapore. For more information visit www.mysteryshop.org.

ESOMAR will hold a research forum, titled "The Future of Mobility," on November 19-20 at the Westin Valencia in Valencia, Spain. For more information visit www.esomar.org.

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

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BEFORE YOU GO ••• issue highlights and parting words

••• cover-to-cover

Facts, figures and insights from this month's issue

page 16 Executives said the average return on conference and trade show participation was between \$4-\$5.99 per dollar invested.

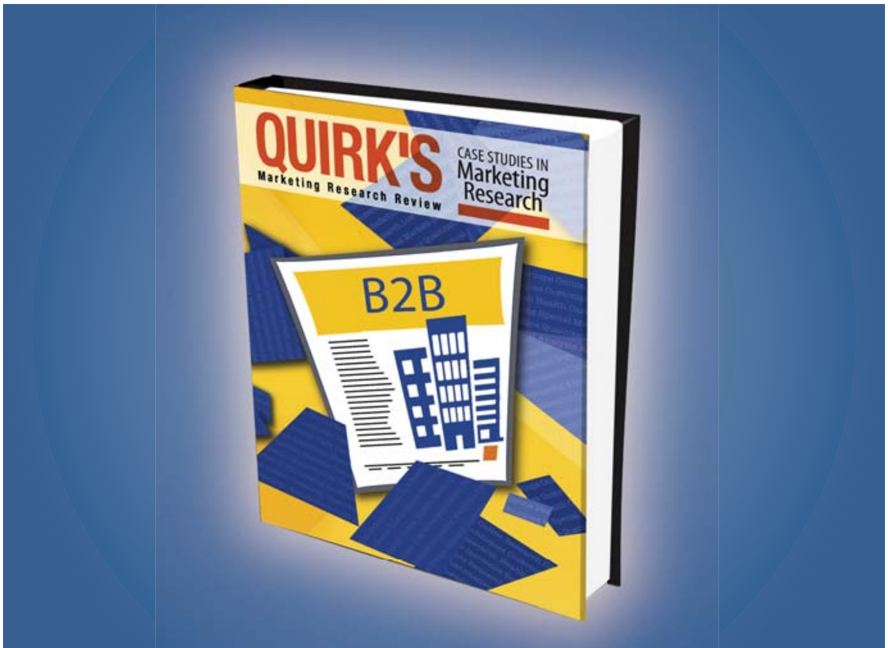
page 34 We need to move from a focus on shopper needs as a driver of action to a focus on choice environments.

page 45 The clearest and most dramatic learning was that ceiling-based signage was completely ignored.

Corporate researchers, it's your time again!

Quirk's, along with the MRA and Corporate Executive Board, is once again a proud sponsor of the upcoming Corporate Researchers Conference (CRC). Held in Dallas on October 16-18, the CRC is the only conference designed by corporate researchers for corporate researchers. As such, the programming is practical and actionable, developed with the knowledge that you work in the real world. The presentations are creative, topical and cutting-edge. And, unlike many other conferences, no speaker slots are sold, so you are guaranteed an agenda free of bias.

Register today at http://crc.marketingresearch.org.



Quirk's B2B case study book coming soon!

Following on the heels of last fall's *Case Studies in Marketing Research: Health Care*, Quirk's is putting the finishing touches on *Case Studies in Marketing Research: Business-to-Business*. Drawn from the pages of *Quirk's Marketing Research Review*, the book offers real-world examples of how business-to-business-facing organizations of all kinds – from building-systems firms to office products makers – have turned to marketing research to address critical business issues.

The book answers questions like: How do you merge two large, formerly competing firms? How do you convince a skeptical audience that your new product won't cost them their jobs? How do you justify the investment in a dealer council?

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

Coming in the August Quirk's

••• utilities

How research has helped invigorate the marketing of energy efficiency programs.

••• social media

How to use text analysis to retrieve useful information from open-ended social media comments.

••• social media

Tim Macer reviews the Semeon social media data analysis platform.

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of technology to deliver the trusted data you demand.
Ken Roe and his SSI Labs team power consistent, reliable sample through exciting technology innovations like the SSI Dynamix™ sampling platform and SSI QuickThoughts™ mobile app.
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