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Marketing Research

Telling a new story

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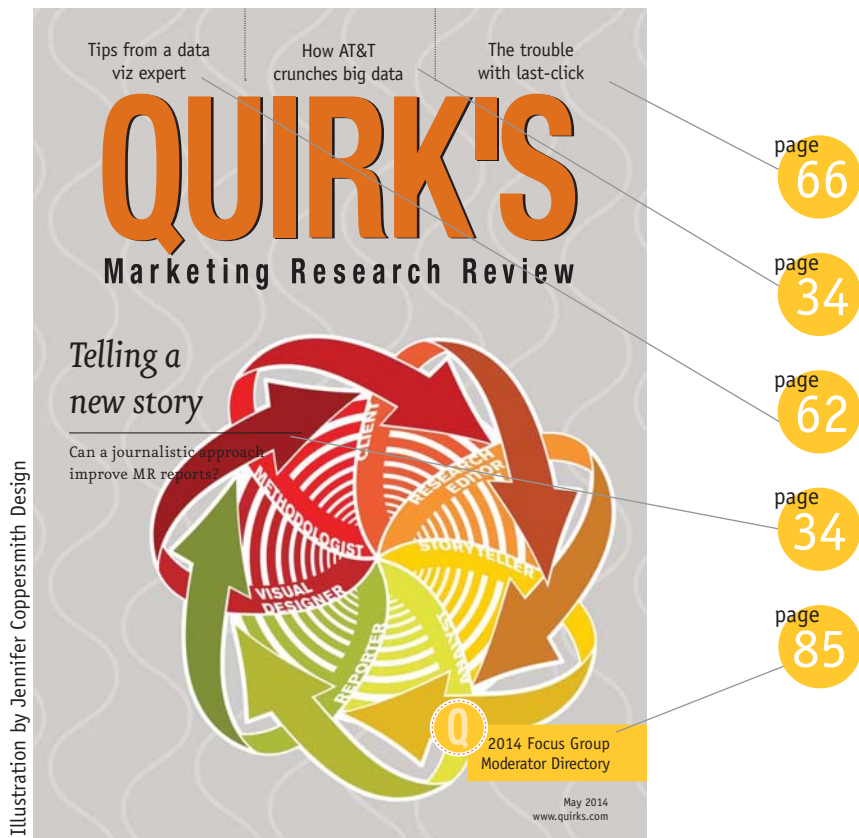


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Extra! Extra! Read all about it!

Quirk's Marketing Research Review has always included industry-related news items in our Names of Note, Research Industry News and Product and Service Update departments. But due to the time it takes for the news stories to hit our desks and then hit the press, we have been looking for an opportunity to give our audience the 411 on the MR goings-on as quickly as possible.



So, starting May 5th, Quirk's is launching **The Daily News Queue, marketing research and insights news on the go**, a free mobile-friendly, daily online news feed that will give subscribers a look at the latest happenings in five minutes or less.

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In Case You Missed It

news and notes on marketing and research

●●● social media research

Automation assists Twitter campaign virality

Like bartenders who treat their regular customers to free drinks, brands are rewarding fans in the era of social media using a mix of social listening and marketing automation. Using Dallas social media marketing company HipLogiq's SocialCompass application, Dunkin' Donuts franchisee First Cup LLC tapped into Twitter's word-of-mouth marketing to grow its customer base in Phoenix with a free coffee offer. First Cup found that one tweet reached almost 3,000 consumers. The success of the campaign suggests that even if virality cannot be predicted, it perhaps can be automated.



First Cup's "Free Medium Hot or Iced Coffee" campaign, which ran from March 26-November 10, 2013, achieved a 120 percent conversion rate with 2,000+ coffee lovers. First Cup used SocialCompass to find local, geographically-targeted tweets about coffee, using keywords and phrases like "want coffee" and "craving coffee," among others. First Cup responded to 1,827 relevant Twitter conversations, with 2,201 people taking advantage of the free coffee offer. When someone redeemed the free coffee offer, First Cup offered an additional incentive, in the form of Dunkin' Donuts Cash, for sharing the offer.

One Dunkin' fan shared the free coffee offer with 1,745 followers and two of his followers retweeted it to another 1,150 people. In all, referrals accounted for an additional 1,485 customers for First Cup during the campaign.

"We knew that Dunkin' fanatics existed back East but didn't know they existed here in Phoenix," said Alex Apodaca, COO of First Cup. "It was incredible to see the results of a few Dunkin' fans connecting with their friends and the viral effect of our campaign."



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●●● foods/nutrition

Consumers voluntarily adopting the free-from lifestyle

For some consumers, avoiding certain foods and ingredients is a matter of life and death. But a report from Packaged Facts suggests that it isn't only celiac disease sufferers or those who keep kosher who are driving the popularity of "free from" food products.

In the absence of a specific health condition, the decision to opt for free-from products – fat-free, sugar-free, salt-free, gluten-free, etc. – can be viewed as a lifestyle choice by consumers who value healthy living. According to Packaged Facts, U.S. consumers who claim they are watching their diet remained at an average of 52 percent from 2006-2013, up from only 28 percent in 2004.

Food manufacturers are extremely accommodating to this shift toward food avoidances, reformulating products to eliminate those ingredients that are being shunned. However, there remains an opportunity for major food and beverage companies to become more active in producing free-from products, as these concerned consumers also tend to be trendsetters in healthy living.

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The world loves its screen time

Every weekend, the screens take over my family. Since my wife and I have basically banned our two daughters from any iPod, iPad, laptop, desktop or TV screen time during the school week, weekends around our place are all about media consumption for the girls.

You can't get them out of bed with a crane on school mornings but somehow on weekends they're both up at 6:15. While our third-grader plays Animal Jam on the Mac laptop in the kitchen, our youngest sits in the nearby living room watching videos from PBS Kids on our iPad. Other times, older sister will take her iPod downstairs to play games and FaceTime with a neighbor friend while her little sis watches *My Little Pony* episodes on Netflix.

Not that my wife and I are any different. As I wait for my coffee's magical properties to kick in, I'm usually poring over the news of the previous evening or debating roster moves in my fantasy sports leagues while my wife grades the homework and discussion-room posts of her distance-learning students.

According to recent research from Millward Brown, scenes like this are being played out all over the world. For its AdReaction Report, the firm surveyed, via smartphone or tablet, more than 12,000 16-to-44-year-old multiscreen users across 30 countries to explore

consumer receptivity to advertising on TV, smartphones, laptops and tablets. Multiscreen users were defined as people who own, or have access to, a TV and a smartphone and/or a tablet.

(With this issue's editorial focus on data analysis and visualization, it's fitting that Millward Brown has set up a fun, interactive site where you can poke around in the data for each country: www.millwardbrown.com/adreaction/2014/#/.)

As reported in a press release, simultaneous multiscreening accounts for 35 percent of screen time and includes a mix of "meshing" – the use of TV and a second screen for related content (14 percent) – and "stacking" – the use of TV and a second screen for unrelated content (22 percent). At 65 percent of screen time, "shifting" among individual screens throughout the day remains the dominant form of screen use. When consumers port an individual task across screens, they most often begin on TV and move to a smartphone but all screen sequences are possible.

With consumers simultaneously using multiple screens just one-third of the time, marketers' larger opportunity is delivering consistent, integrated campaigns as users shift between screens, Millward Brown says. Related to specific screens:

TV remains strong for brand-building, and in particular drives salience and affinity. While no longer the most-consumed screen globally, TV delivers strong reach and enjoys the highest advertising receptivity. It does remain the most-used screen in the U.K., France and Spain.

Smartphones are now the most used screen globally. With strong




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Joe Rydholm can be reached at joe@quirks.com

daytime use, smartphones are good for delivering salience, difference and setting trends. Multiscreen users in Nigeria report the highest time spent on smartphones, at more than 193 minutes per day, 31 percent higher than the global average of 147 minutes per day.

Laptops deliver salience and relevance for marketers. Consumers report 108 minutes of use per day on laptops, the majority (71 percent) being exclusive. However, laptops deliver only moderate advertising receptivity. They are the top screen for multiscreeners in Russia, Poland and the Czech Republic.

Tablets deliver difference for brands and nearly half of tablet use (49 percent) is simultaneous with TV. Peaking during the evening, tablets deliver difference but only moderate receptivity. Receptivity to ads on tablets was notably high in Kenya, Nigeria and the Philippines.

Specific to multiscreen marketing opportunities, AdReaction found that consumers are most receptive to micro-video; TV ads with interactivity; and TV ads promoting mobile apps, Facebook pages and Web sites. Marketing that delivers more entertainment and rewards is generally preferred over multiscreen campaigns which simply offer more information. 



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IN FOCUS

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



// Survey Monitor



••• social media research

6 Facebook facts

A decade in, usage keeps evolving

Facebook turned 10 earlier this year and maintains its position as the dominant social networking platform, used by 57 percent of all American adults and 73 percent of all those ages 12-17, according to data from the Pew Research Center, Washington, D.C. Adult Facebook use is intensifying: 64 percent of Facebook users visit the site on a daily basis, up from 51 percent who were daily users in 2010. Among teens, the total number of users remains high and they are not abandoning the site, despite Twitter's increased popularity. But focus group interviews suggest that

teens' relationship with Facebook is complicated and may be evolving.

New Pew Research Center survey findings show how people are using Facebook and what they like and dislike about the site. Here are six highlights.

1. Some users dislike certain aspects of Facebook but fear of missing out (FOMO) on social activities isn't one of them.

One aspect many detest is oversharing by friends and people who post another's personal information (such as photos) without first asking permission. Parents are especially protective of images of their children, as 57 percent of Facebook users with children under the age of 18 say that people posting pictures of their children without asking permission first is something they strongly dislike about using Facebook.

On the other hand, the FOMO phenomenon resonates with only a small portion of the Facebook population. Just 5 percent of Facebook users strongly dislike the fact that Facebook allows them to see others taking part in social activities that they themselves were not included in and 84 percent of users say that this aspect of Facebook life doesn't bother them at all.

2. Women and men often have varying reasons for why they use Facebook but everything starts with sharing and laughs.

Users say they especially appreciate photos and videos from friends (47 percent say that's a major reason they use the site); the ability to share with many people at once (46 percent cite that as a major reason); updates from others (39 percent); and humorous content (39 percent). Other aspects of Facebook (e.g., keeping up with news, receiving support from the people in one's network, etc.) appeal to a more modest audience of users. Men and women sometimes vary in their reasons for using the site.

3. Half of all adult Facebook users have more than 200 friends in their network.

Facebook users differ greatly when it comes to the number of friends in their networks. Nearly 40 percent of adult Facebook users have between one and 100 Facebook friends; 23 percent have 101-250 friends; 20 percent have 251-500 friends; and 15 percent have more than 500 friends.

Among adult Facebook users, the average number of friends is 338 and the median number of friends is 200. Younger users tend to have significantly larger friend networks than older users: 27 percent of 18-to-29-year-old users have more than 500 friends, while 72 percent of users ages 65+ have 100 friends or fewer.

4. Twelve percent of Facebook users



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say that someone has asked them to unfriend a person in their network.

Younger users are more likely to have experienced this than older users, as 19 percent of 18-to-29-year-old Facebook users have had someone ask them to remove a friend from their network (compared with 10 percent of 30-to-49-year-olds; 7 percent of 50-to-64-year-olds; and 5 percent of those 65+).

These friend-removal requests tend to come primarily from other friends (35 percent) or from current (23 percent) or former (12 percent) spouses or romantic partners. Some 38 percent of those who received this type of request say that they were asked to remove a friend from their Facebook network, while 22 percent were asked to unfriend a former romantic partner.

5. Facebook users Like their friends' content and comment on photos relatively frequently but most don't change their own status that often.

When asked about the frequency with which they engage in certain behaviors on the site, Facebook users tend to point toward Liking content that others have posted and commenting on photos as the activities they engage in most often. On the other hand, most users change or update their own status only occasionally.

Forty-four percent of Facebook users Like content posted by their friends at least once a day, with 29 percent doing so several times per day. Over 30 percent comment on other people's photos on a daily basis, with 15 percent doing so several times per day. Almost 20 percent send private Facebook messages to their friends on a daily basis, with 10 percent sending these messages multiple times per day, and 10 percent change or update their own status on Facebook on a daily basis, with 4 percent updating their status several times per day. Some 25 percent of Facebook users say that they never change or update their own Facebook status.

6. Half of Internet users who do not use Facebook themselves live with someone who does.

Many non-Facebook users still have some familiarity with the site through family members. Among Internet users who do not use Facebook themselves, 52 percent say that someone else in their household has a Facebook account. In many instances, these may be parents who do not use Facebook but live with a child who does. Two-thirds of parents with a child living at home who do not use Facebook themselves say that someone in their household has a Facebook account. In addition, some 24 percent of Facebook non-adopters who live with an account holder say that they look at photos or posts on that person's account.

www.pewresearch.org



●●● public opinion Degrees of discrimination

How perception of
discrimination among
minority groups varies

Some would argue that the U.S. has come a long way in tackling discrimination and that the U.S. is far more progressive and equality-minded than either its historical self or many countries today. However, a poll from Rochester, N.Y., research company Harris Interactive indicates that Americans still believe many groups are discrimi-

nated against. When Americans are presented with several groups – blacks; Hispanics; people of Middle Eastern descent; women; and LGBT adults – and asked if those groups are discriminated against in each of a series of aspects of American life, majorities feel discrimination exists for most of these groups in at least one area.

So, who is most discriminated against? The easy answer to this deceptively complex question is “everyone.” Each of the five groups tested were among those most likely to be seen as discriminated against in at least one aspect of American life.

Blacks are most perceived as discriminated against in the way they are treated by police (59 percent); getting decent housing (34 percent); and getting a quality education in public schools (26 percent).

Hispanics, meanwhile, are among those most perceived as discriminated against in getting both white-collar office jobs (39 percent) and skilled labor jobs (29 percent).

Turning to those of Middle Eastern descent, this group is among those most commonly perceived as discriminated against in the way they are treated by the federal government (34 percent), a perceptual distinction they share with LGBT Americans (35 percent).

By a considerable margin, women are the group most perceived as discriminated against in the wages they are paid (60 percent). They also rank second only to LGBT adults as the group most perceived as discriminated against in getting full equality (52 percent).

LGBT Americans are most perceived as discriminated against in the way they are treated as human beings (62 percent) and in getting full equality (57 percent), along with ranking just ahead of people of Middle Eastern descent for the perception that they are discriminated against in the way they are treated by the federal government (35 percent).

Perhaps not surprisingly, when results are examined specifically among the group in question, perceived discrimination outpaces perceptions

among the general population nearly across the board. A vast majority of black Americans (85 percent) feel that blacks are discriminated against in the way they are treated by police, while 78 percent feel they are discriminated against in getting full equality. Roughly seven in 10 say the same for the way they are treated as human beings (71 percent) and in getting white-collar office jobs (70 percent). About six in 10 say they are discriminated against for the wages they are paid (63 percent), getting decent housing (62 percent), getting skilled labor jobs (61 percent) and the way they are treated by the federal government (60 percent).

Roughly eight in 10 LGBT adults feel that LGBT Americans are discriminated against in getting full equality. Nearly three-fourths feel they are discriminated against in the way they are treated as human beings (73 percent) and roughly

two-thirds feel they are discriminated against in the way they are treated by both police (67 percent) and the federal government (65 percent).

Seven in 10 American women feel that women are discriminated against in the wages they are paid (70 percent) and 62 percent feel that women are discriminated against in getting full equality (62 percent).

Over six in 10 Hispanic Americans feel that Hispanics are discriminated against in the way they are treated by police (62 percent) and just over half feel they are discriminated against in getting full equality (52 percent) and in the wages they are paid (51 percent).

Those of Middle Eastern descent represent too small a sample to be accurately represented in an examination of their own views on discrimination.

www.harrisinteractive.com



••• data privacy
Quid pro quo

Consumers would share personal data in exchange for perks

With the wealth of personal data available online today, marketers are forced to walk a fine line between



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helpful and intrusive personalized marketing tactics. Yes, consumers are protective of their privacy but the good news is that many are willing to give a little to get a little. According to a study from Boston research company Communispace, 70 percent of respondents said they would voluntarily share personal data with a company in exchange for a mere 5 percent discount.

However, proving that the proverbial tightrope still exists, 86 percent of consumers would click a “do not track” button if it were available and 30 percent of consum-

ers would pay a 5 percent surcharge if they could be guaranteed that none of their information would be captured.

Overall, the study found that consumers tend to be distrustful of targeted marketing, which while often accurate, can offend by appearing overly familiar with personal aspects of their lives. Only 14 percent of consumers, if given the choice, want to shop by receiving targeted offers based on their online search and purchase history. Sixty-two percent of consumers would prefer to find promotions and discounts from multiple vendors at one centralized site, while 24 percent would like the opportunity to broadcast their shopping needs to invite retailers to bid for their business.

Some attitudes toward data privacy seem to be age-driven. Consumer likelihood to disclose personal data in exchange for deals, for example, decreases with age. Sixty-two percent of the Silent Generation would choose to share nothing rather than get perks, while only 40 percent of Millennials say this. However, when presented with various personalized marketing scenarios, consumers showed similar levels of acceptance across age groups.

The single biggest breach of trust involves the buying and selling of personal data, as only 13 percent approve of this practice. Even if they have technically granted their consent, consumers express extreme distaste for, and occasionally claim to boycott, companies that engage in these types of practices.

www.communispace.com



●●● restaurants Cutbacks cut deep

Nearly three in 10 Americans plan to spend less on dining out

It's been one step forward and two steps back when it comes to news on the economy in 2014.

National jobs data for first-quarter 2014 was somewhat bleak, while early-2014 saw a heated debate in Washington over raising the minimum wage. Unfortunately for the restaurant industry, it has more to worry about than most, as 29 percent of Americans say they intend to spend less on dining-out in the year ahead – the highest percentage of cutbacks among 14 diverse categories asked about in a study conducted by AlixPartners, a Detroit business advisory firm. The study also addressed spending on entertainment, leisure activities, sports equipment, travel, clothing and home furnishings.

In addition to dining out less overall, diners expect to spend 9.1 percent less per restaurant meal in the year ahead (vs. what they say they spent per meal in the past year, to \$13.55 from \$14.91), a slide backward from a similar AlixPartners survey in 2013 when diners then said they expected to spend only 5 percent less in the year ahead.

Meanwhile, the percentage of Americans in the survey dining out at least weekly over the last 12 months dropped from 60 to 57 percent from the survey of a year ago. The top reason given for cutting back on visits was – for the second year in a row – the desire to eat healthier, even beating out “current finances” as a reason. In a similar vein, 84 percent said that healthy menu options are at least somewhat important to them in choosing where to dine out, virtually even with survey results from a year ago (86 percent).

However, only 20 percent said such options were very or extremely important, down from 29 percent in the survey of a year ago, and a whopping 52 percent said that nutritional information provided on menus has no impact on their ordering decisions, up from 45 percent in the survey a year ago. Only 16 percent said they'd be willing to pay a premium for certified-organic food at restaurants, all pointing to a possible disconnect today between what consumers say they want and what they're actually willing to order and to pay for.

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IN FOCUS

Product and Service Update

••• diy research

Assuming the PowerPosition

Toluna debuts competitive analysis solution; offers analytics platform as standalone tool

Wilton, Conn., research company Toluna has launched PowerPosition for Toluna QuickSurveys, the company's DIY survey solution. PowerPosition is an automated survey tool designed to provide fast turnaround, strategic positioning and communications insights to brands, research agencies and consulting companies.

PowerPosition users identify their own brand or product, name three competitors, list 10 key attributes to assess and then target whom they want to interview. After those four steps, results and insights are available in real time, with most projects complete within a few hours.

The Toluna QuickSurveys PowerPosition platform includes access to a panel of over six million global consumers, with the ability to select profiles to add to a client's own list of people; SmartSelect profiling, ensuring respondents are representative of the cohort; and a full suite of analytics for interpretation and action.



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••• diy research

SurveyMonkey goes to the Office

Office plugin gives PowerPoint and Word analytic power

OfficeReports, a Copenhagen, Denmark, data analysis and reporting overlay within the Microsoft Office suite, has released



a new version of its software that integrates directly with SurveyMonkey. The combination is designed to allow users to create tables and charts from SurveyMonkey data without leaving PowerPoint or Word.

OfficeReports aims to convert PowerPoint and Word into fully-functional survey analysis and reporting programs capable of reading raw data and producing crosstabular and statistical analysis.

OfficeReports is provided as a simple download, which adds data analysis capabilities as a new menu in both Word and PowerPoint. This includes creating new variables and crosstabs, defining filtering, weighting and statistical testing and refining the output formats. Licenses for professional users cost approximately \$25-\$75 per month, with a free version available.

www.officereports.com

Separately, TolunaAnalytics, Toluna's Web-based data reporting, analysis and visualization solution, is now available as a standalone tool. www.quicksurveys.com/power-position

The service is currently available for the U.K., with plans to become available internationally for multi-country surveys across Europe and most other developed countries. www.visionone.co.uk

••• mobile research

Lightning strikes smartphones

Mobile service touts quick mobile surveys – and results

London research company Vision One has launched Lightning, a mobile survey service designed to provide fast answers. Each Lightning survey is dedicated to a single client and respondents are drawn from a panel of 400,000+ U.K. smartphone users. With live reporting and monitoring, Vision One aims to offer next-day delivery for many projects.

••• eye tracking

Tracking the ShelfGaze

Eye-tracking research solution gets new glasses

PreTesting Group, a Tenafly, N.J., research company, has expanded its ShelfGaze consumer behavior tracking technology. The expansion, coming in the form a seemingly-ordinary pair of eyeglasses, includes mobile package recognition software that aims to allow completely passive testing of in-store shopper behavior and give brands an

in-depth look into consumers' interaction with their products.

The glasses work by tracking volunteer shoppers' eye movements, measuring noting patterns, consideration and other key insights. These insights can then be used by brands to discover the effect that packaging, location and display have on the shoppers' behavior and make adjustments to their packaging or in-store displays to increase exposure and sales.

www.pretesting.com

●●● social media research

A social SurveyMonkey

DIY research now incorporates social media data

San Francisco social analytics company Picki has partnered with SurveyMonkey to provide customers an integrated experience for the collection and analysis of social data of survey respondents. Through this integration, SurveyMonkey customers can access their surveys via the Picki interface and see their survey results, enhanced with rich social data, in a real-time dashboard, with a setup time of under a minute.

Users can access 200+ social data points from over a dozen sources, including Facebook, LinkedIn, Twitter and Google+, to better understand the audience and make offers, re-market and retarget.

<http://picki.com/surveymonkey>

●●● mobile research

Lumi Survey Says!

Lumi launches mobile survey app

London research company Lumi has launched Lumi Say, a self-service tool for building mobile surveys.

www.quirks.com

Extending the Lumi Survey platform, the mobile app is designed for market research and stakeholder engagement and is deployable across iPhone, Android and mobile Web.

Lumi Say offers geo-fencing and geo-triggering capabilities; event triggers and notifications; a synchronized approach with mobile Web and the native (offline) app; and an intuitive user interface.

www.lumiinsight.com

●●● concept testing

Get a first read fast

Ipsos offering promises quantitative survey results in 18 hours

New York research company Ipsos InnoQuest has created a research solution designed to test ideas and deliver quantitative feedback from a representative sample of consumers in 18 hours. InnoQuest Ideas Overnight builds on the InnoQuest Ideas platform to provide a quick snapshot to help gauge the potential for new ideas. Its strength is in helping marketers determine if their first steps are heading in the right direction so they can go from brainstorming into further product development in just one step.

InnoQuest Ideas Overnight is intended to offer quantitative idea screening to test up to 100 ideas in less than 24 hours. Currently available in France, Germany, Italy, Spain, the U.K. and the U.S., it operates in the context of a client workshop or as a last-minute idea screening. Employing opportunity scores, the solution helps prioritize ideas and determines which are most likely to succeed as fully-articulated concepts.

www.ipsos-na.com

●●● hybrid research

Interviewers get Interceptor

Scheduling tool facilitates Webcam interviews from surveys and social media

Discuss.IO, a Seattle research software company, has released Interceptor, a browser-based scheduling tool intended to allow qualitative researchers to recruit live Webcam respondents from quantitative surveys, social media and market research online communities.

Researchers can define when they are available to conduct interviews and add a link to their survey or social media page. Interceptor is designed to manage scheduling, logistics and incentives. Each respondent will answer screening questions, including a video-response question using their Webcam. Video responses are available in advance of the interview session for review by the researcher.

www.discuss.io

●●● advertising research

A Flurry of in-app options

Two researchers combine behavioral data and mobile ad measurement

Flurry, a San Francisco mobile analytics and advertising company, and Research Now, Plano, Texas, have partnered to improve mobile ad targeting and to measure the effectiveness of in-app advertising. To do this, the companies have built a panel and behavioral dataset on mobile consumers and will use that data to build new

products to help marketers.

Research Now will enhance Flurry Personas – audience segments built with behavioral data from 150 billion app sessions across 1.3 billion devices each month – with profile and survey-based information about consumers' brand preference, recent purchases, purchase intent and more. Marketers can choose to enhance any of Flurry's 40+ Personas with Research Now insights or work with Flurry to develop custom Personas for the audience they are trying to reach.

Additionally, leveraging Flurry's advertising platform, Research Now has built ADimension Mobile to evaluate in-app advertising effectiveness. Once the target audience has been defined and identified by Flurry, Research Now can passively track opted-in panelists exposed to in-app advertising campaigns – served via Flurry – and compare them to unexposed groups.
www.researchnow.com

●●● mobile research Telling GeoStories

Mobile geo-location solution catches consumers in-the-moment

2012o|2o Research, Nashville, Tenn., has launched GeoStories, a service designed to allow researchers to quickly conduct on-the-spot interviews using mobile geo-location technology. GeoStories combines identification of consumers at specific locations with instant interviewing capability and offers immediate results.

The full-service program aims to identify shoppers who are at a particular site, such as a targeted store. The technology activates a notification that gives the shopper the

opportunity to complete a screener and, if qualified, participate in a qualitative interview in the store and on the spot.

www.2020research.com

●●● social media research Put it in Context

New solution offers social frame for consumer segments

Bellevue, Wash., research company Lightspeed GMI has launched Context, a social intelligence solution that aims to profile and survey existing consumer segments through a social lens. Context can be added to existing research projects to drive additional insights or can be viewed independently of primary research via ad hoc reports and DIY tools. Context also offers a dashboard solution.

Clients can incorporate the combined Context dataset into any stage of the research process (e.g., targeting, survey analysis, pre-survey design, etc.). Users can customize their research and analysis by enabling clients to group custom sets of pages that reflect their marketplace view and to incorporate that view into research execution.

www.gmi-mr.com/solutions/context

●●● Briefly

■ The Marketing Research Institute International (MRII), St. Louis, has launched an online Principles of Mobile Market Research course. The 10-hour, self-study course aims to provide a solid foundation for conducting mobile market research globally. Graduates will receive one continuing education unit from the University of Georgia, along with a recognition of course completion certificate from MRII, the Marketing

Research Association, ESOMAR and UGA. The course was written by Ray Poynter and edited by Reg Baker.
www.mobmarketresearch.org

■ RealityMine, a Manchester, U.K., research company, has added passive measurement and longitudinal data to its USA TouchPoints service, which analyzes consumer media usage in everyday life.
www.realitymine.com

■ New York research company GfK MRI has launched 44 consumer segments based on its information on consumers' offline activities and attitudes via three data management platforms: BlueKai, eXelate and Lotame.
www.gfk.com/us

■ Decipher Inc., a Fresno, Calif., research company, has adopted a discounted pricing structure for clients fielding mobile-compatible surveys. The model allows those using Beacon, the company's market research and reporting platform, to affordably integrate mobile into their research practice by lowering hosting fees by 25 percent for surveys that are 15 questions or fewer and mobile-compatible.
www.decipherinc.com

■ Prosper Insights and Analytics, a Worthington, Ohio, research company, has released Healthcare Coverage Vital Signs Matrix, an analysis of 15,000+ consumers comparing health diseases/conditions to health care coverage.
www.goprosper.com

■ Research Now Healthcare, a London division of Research Now, Plano, Texas, has launched its arthritis panel, including 25,000+ U.K. panelists who have been diagnosed with fibromyalgia, gout, large joint arthritis, osteoarthritis, psoriatic arthritis or rheumatoid arthritis.
www.researchnow.com

■ Bangalore, India, research company Borderless Access has launched a panel in Chile. www.borderlessaccess.com

■ Aptel Research, Cambridge, Mass., has released Patient Voices Series Rheumatoid Arthritis (U.S.), a report on the emotional and rational factors that impact the patient journey for people living with moderate-to-severe rheumatoid arthritis. www.aptelresearch.com

■ Thoroughbred Research Group, Louisville, Ky., has been certified as an in-center hemodialysis consumer assessment of health care providers and systems vendor for the 2014 administration by the National Committee for Quality Assurance, Washington, D.C. www.torinc.net

■ New York researcher The Nielsen Company has announced plans to bring its Twitter TV solutions to Australia in the second half of 2014. The service is also scheduled to expand to Italy in the fall. www.nielsen.com

■ Dialsmith, a Portland, Ore., research technology company, has launched a worldwide affiliate program to help clients work with facilities that are suited to serve clients who want to use Dialsmith's Perception Analyzer tools. Participating facilities include Adler Weiner, Estudio Silvia Roca, Fieldwork, Ingather, i-view London, PVR Research, Shugoll Research and watchLAB. For the most current list of member facilities by city, visit <http://dialsmith.com/services/affiliate-facilities.html>.

■ Ann Arbor, Mich., research company CFI Group has been awarded Patent No. 8,666,515, adding new analytic capabilities to the statistical modeling engine used by the American Customer Satisfaction Index research organization, Ann Arbor, Mich. CFI Group is the exclusive partner of the ACSI. www.cfigroup.com

■ VideoMining Corp., a State College, Pa., research company, has redesigned its corporate Web site at www.videomining.com.

■ Invoke Solutions, a Waltham, Mass., research company, has been awarded Patent No. 20140038725, for Invoke Live, a software platform that allows for simultaneous interactions with large numbers of people, ranging from several hundreds to thousands, in a real-time event. www.invoke.com

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Effectively using correspondence analysis

| By Edward "Paul" Johnson

snapshot

An apparel-industry case study explores how to measure and compare consumer perceptions of brands with correspondence analysis.

How is my brand perceived? This is the question that plagues many of my clients. There are some standard metrics which measure overall perception such as the Net Promoter Score or measures of aided and unaided awareness. However, most of these lack color and depth of detail. They can measure the brand health overall but don't diagnose the causes and reasons behind the brand's state of health.

To delve deeper into the details, many companies will ask how well they perform on different aspects of the business. To get a complete picture you often need to ask a rainbow of questions and it isn't uncommon to have 30 or more of these attributes. Furthermore, for strategic reasons our clients often want not just perceptions of their own brands in absolute terms but also how they match up to the competition. This detailed information can lead to great insights but there is also a

danger of information overload.

I have seen clients take many approaches to understanding brand information. Some look through reams of paper crosstabs complete with summary tables. Ironically, even though they are cutting down many trees with all this paper, they still get lost in the forest! Let's look at an example.

Let's say I am a brand manager of a clothing retailer. I want to see how the general population perceives our brand as well as the competitive brands in my category. Also, I want a complete look at the attitudes and drivers that I believe can contribute to my brand health and image. Through a remarkable amount of self-restraint in an effort to not get lost in the data I limit myself to just the list of 24 dimensions in Table 1. I do want to compare my brand to a broad scope of competitors though, so I collect data on 20 competitors.

Table 1: Attributes to Examine

Good online presence	Treats their employees well
Treats me like a valued customer	Makes it convenient for me to get what I need
Good value for the money	Is a one-stop shop for my needs
Has the designers I am looking for	Has a loyalty program I value
Makes me feel good about my body	Has friendly and helpful employees
Only carries quality clothing that won't wear out	Is a treat I indulge in only on special occasions
Has a great return policy	Fun to browse their selection
Is family-friendly	Is the hip place to shop
Lowest prices	Carries the latest in fashion
Wide selection of clothing	Has good music playing in their store
Meets any special needs I have for clothing	Overpriced
Is honest and trustworthy	Good shipping and delivery process



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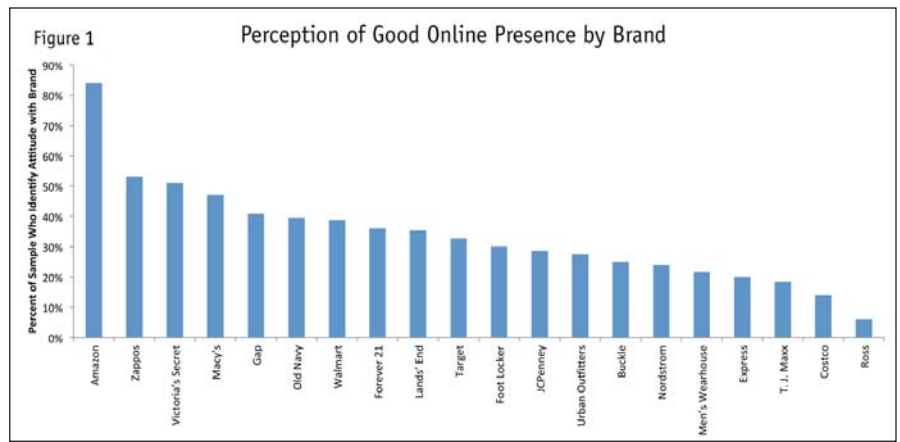
info@e-tabs.com

e-tabs.com

To keep the integrity of my data, I do a few things to ensure I get an accurate image of each brand. These checklist items are important to do whenever you are measuring brand perception because any analysis is only as good as the data you get from the respondents.

- Only ask respondents about brands they are aware of and have interacted with. This is particularly important with rarer brands. If respondents don't feel they know the brand, they may not associate anything with the brand, leaving me with no data on it.
- Only ask respondents about a few brands even if they are aware of and have interacted with a majority of the brands. Respondent fatigue can be a real problem, so I recommend a maximum of four or five brands per respondent. This helps keep the survey length down and prevents information overload on one screen.
- Avoid scale effects. Instead of having each brand rated on each attribute with a Likert scale, I ask them to specify which of the brands exemplify each attribute. This minimizes the amount of satisficing a respondent will do in a survey.

I now have a table for every one of these dimensions. When examin-



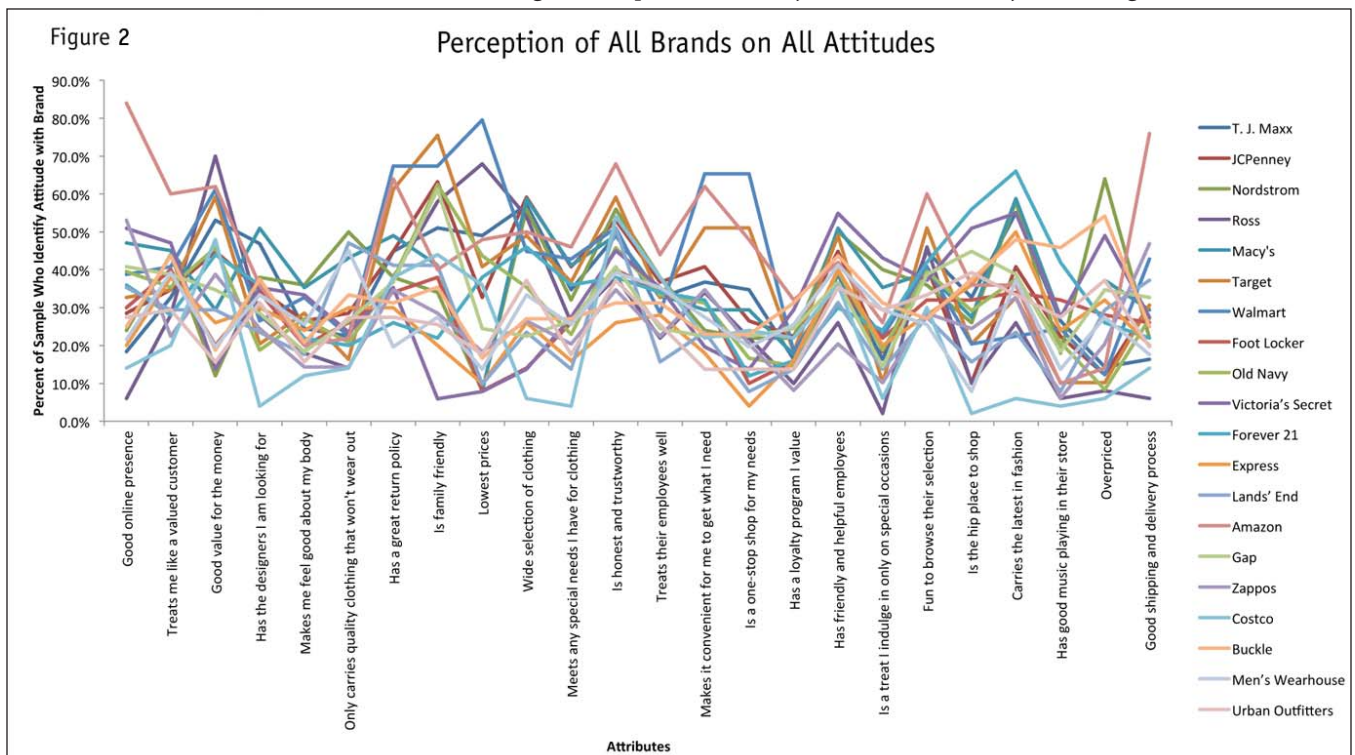
ing each separately I can gain some valuable insights. For example, the graph on the “good online presence” seen in Figure 1 clearly demonstrates the advantage Amazon has in the online space. You can also clearly see that Ross in particular doesn't have a strong online presence in the minds of the general shoppers.

Each of these individual “trees” is valuable but when you try to plot them all in one graph, suddenly it is hard to see the forest. Figure 2 shows all 20 brands on all 24 dimensions graphed as a line chart. It quickly becomes a mess, making it difficult to decipher any trends or even see which stores are similar to each other.

Luckily, there is a way to simplify this graph and still provide valuable insights. This can be done through correspondence analysis and

a perceptual map. Correspondence analysis takes the counts of brand identification with each attribute and summarizes them into two or three dimensions at a time. These dimensions form the basis for a coherent plot that quickly allows a brand manager to see what's important in the competitive landscape.

An example of a two-dimensional correspondence analysis map is shown in Figure 3. I used R, free software that anyone can download, to make the correspondence map. You can see what the dimensions mean by looking at the red lines. First you look at which arrows are pointing in the same direction to see which attributes go together in the public's mind. In this graph “good online presence” and “good shipping and delivery” tend to go hand in hand



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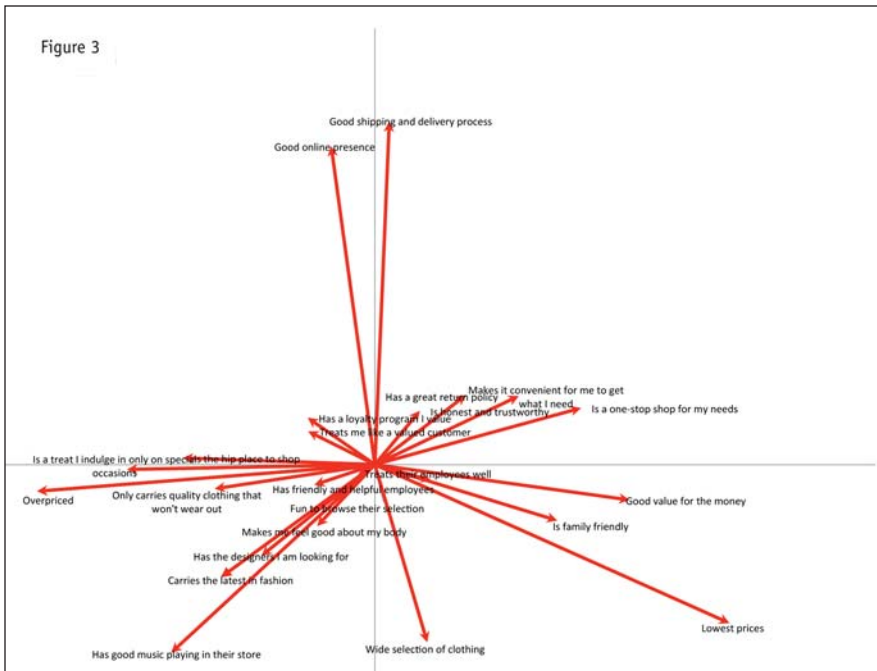
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because they are both pointing up. Furthermore these two attributes are perceived as opposed to “wide selection,” “latest in fashion” and “has the designers I’m looking for,” which are pointing down. In general a brand is perceived as being good at one or the other but not both.

Looking from right to left, I can see that being family-friendly works in conjunction with value shoppers who focus on price and convenience (pointing to the right), while people going to clothing stores to indulge or treat themselves tend to prefer a more hip environment (pointing to the left). These trends are useful for mapping how consumers think of brands in general and what attributes go well together in their mind. Also,

it is interesting to see what gets stuck in the center. For example, treating employees well doesn’t score highly on any of these dimensions, so no stores are really strong in this area.

Figure 4 shows how the brands plot on these dimensions. You can easily see some clusters in this chart. For example on the left a little under the X axis you can see that Nordstrom, Buckle, Urban Outfitters and Express all group together in a higher-priced group that is more hip. We don’t see Nordstrom scoring better on the customer service items such as “treats me like a valuable customer.” This can be an important warning sign if they believe their value-add is in customer service. It is also not surprising that on the right-

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WinCross 14

| By Eric Ramon

snapshot

Freelance data processor Eric Ramon outlines why he's still sold on his favorite tab package.

The new edition of WinCross, the tabulation software package from The Analytical Group, Scottsdale, Ariz., is out. This version is number 14 and each one has become easier to use – which, for a freelance data processor like me, can be worrisome. I mean, how good, how easy will WinCross be by version 30? Will we be able to merely look at a questionnaire and get tables instantly? I sort of hope not because I'd like to stay in business but, at least for now, I can relax a little.

If you can't already tell, I love this program. It makes sense. It's fairly easy to use and allows a lot of room for creativity. I've found that pretty much anything I want to do with crosstabs can be done in WinCross. To be sure, SPSS is powerful in its own way but I prefer WinCross for handling crosstabs. I find that SPSS is not as user-friendly. I get tired of looking something up and getting 50 possible matches for my problem, none of which really have anything to do with it and, furthermore, none of which tell me anything other than SPSS is the leader in statistical software.

But about WinCross...

The "what's new" document is 36 pages long, with plenty of new features or modifications. Let's see what's there, shall we? The first thing I came across that was extremely useful was in how sample balancing is handled. "Sample balancing" is what some people call "data raking" or what I think of as "weighting using more than one variable." Previously, I would plug in my target percentages for each value, for however many variables were being used for the weight factor. On occasion, however, there'd be a missing value and I'd get an error message that said something like "There's nobody in at least one of the many cells, fool!" OK, I exaggerate. But that's what it felt like, though, and there'd be no clear indication of what was missing. For example, there might have been nobody classified as a Pacific Islander and I might have wanted Pacific Islanders to be 1.5 percent of the weighted total. Or there might have been nobody in the 35-39 age group. I wouldn't know this until I ran frequencies on each

WinCross tabulation software (www.analyticalgroup.com)

Pros

- Improved editing
- Hyperlinks in table of contents take you directly to table
- Templates for simplified setup of tables and banners
- Weighting easier than ever

Cons

- Not enough videos
- Excel output resets to .xlsx


Pricing

- Desktop edition: first user - \$2,495 (each additional user \$1,995). Network edition: up to 10 users - \$15,000; up to 20 users - \$25,000; up to 30 users - \$35,000; up to 50 users - \$45,000; more than 50 users - \$50,000. Enterprise license: \$75,000. All WinCross perpetual licenses include free support and upgrades for one year from the original date of purchase.



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variable. That's not much of a chore but it's been annoying.

Well now, as each variable is clicked on, WinCross scans the data and gives us counts for each value and doesn't show missing values. There's no way to ask for a non-existent group to be weighted. We can see where we have to adjust. It might seem minor but it's typical of the changes in the new version. When you add up all these features you've got more convenience and you save time in getting tables set up and out.

Here's another nice new feature: The glossary tests now let us specify what variables we want to look at, besides just testing for certain logic. In the old days we might have asked, for example, for a listing of respondents who had the same code in two different fields. The report we'd get back would show a confusing layout of the whole record. If the length of each record happened to be 1,500 "columns" we'd have 15 lines to look at. We'd have to go to a data map to figure out where those responses were, then

hope we were looking at the right line. Now we can ask for the record number, the first field, the second field and we can see it in an easy-to-understand format.

Some of the newer items don't interest me much although I can see how some people would love them. Enhanced text reports are either spiffy or cluttered, depending on your taste. The report look is customizable so I could end up loving it. You can color lines, which makes it easy to read across. This is an odd- or even-line thing, rather than a frequency or percentage shading. Sometimes your off-white (or whatever color you choose) cell is one, sometimes it's the other. One nice item, however, is that significance testing shows up in different colors. I'm used to seeing a capital letter if there's significance at the 95 percent level and lowercase at the 90 percent level. That's still true but it sure is easy to spot when one is red and the other is blue. You can also enhance the report in other ways. I'm currently experimenting with the elements. Maybe I'll find one that's pleasing.

Another feature I like is a new option for the reports: hyperlinking! Click on the table name in the table of contents and you go right to your page. That's useful. No pulling the sidebar down, overshooting your table, scrolling back up ... now you go right to it. The only problem I have with the Excel features is that it appears the output defaults to an .xlsx file, even if you've already run it as an .xls. If you want to make changes and re-run you'll have to remember, if you want that older .xls format, to change it each time, even in the same session. Other new options include freezing the banner and putting significance in the same cell.

Make life easier

There are all sorts of other little improvements that make life easier. The NET feature has always been useful. Previously, we could give the instruction NET 4, which would then add up the number of respondents in the four items listed immediately below it. But if we wanted to show the items first, followed



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by the net, we had to spec it out, which could sometimes get complicated. Now they've added a NET-. This does exactly what I'd want it to do. So NET -4 lets us show that net below the items with WinCross doing the heavy work.

Many of us write our WinCross specs as a text file. Let me say here that I love that! I happen to use EditPad and I can make changes quickly. For those who want to edit their table specs in WinCross itself, there are now more options. You can find and replace and specify what type of section you want to change. If you want to make a global change to the way rows are defined you can choose "Table Row Logic" and that's the only place your changes will occur. Similarly you can save bits that you can use as templates.

An example of this template business is the banner template, which lets you build your banner by choosing variables. It's pretty cool and if your columns come straight from the questions this will save time. By "straight from" I mean sometimes they won't. Sometimes you'll want to combine things, like "males 18-34." In that case you'll still need to go in and edit an individual banner point but using the template can get you started. And you can then save the template for inclusion in a later survey.


Which brings up this new item: a feature called Express Tabs, which mimics an old-style SPSS table. An important note here: This only works with SPSS data that already has value labels. Click on a question name as your banner, click on another question name as your rows and up pops the crosstab. It's virtually instantaneous. Very impressive! Since you can select more than one question for either your columns or rows and since you can save your banner (!), I find this a better, faster way to create a banner than using the Banner Template feature. But take your pick, they're both useful.

WinCross also now has a feature called Tip of the Day. On start-up you get a useful reminder of how to do this or that. For example, I called up a tip just now and it brought up a screen about the video

tutorials. If you need to see how something is done you can watch those. So thanks, Tip!

Help is superb

As with just about any kind of software, it's all about the features and, as I've outlined above, WinCross has many good ones. Another important aspect is tech support and I can report that the help for WinCross is superb. Many companies are distant, difficult to get ahold of, have less-than-adequate manuals and/or

help forums and seem to take their customers for granted but that's absolutely not the case here. The folks at The Analytical Group seem to listen to the feedback they receive and get on it, continually improving the program. I've got a wish list with a few items that I'll be sending them. Who knows? Maybe they'll use them in Version 15! 

Eric Ramon is owner of The TabLab, a Portland, Ore., research firm. He can be reached at eramon1@aol.com.



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●●● data analysis

The best of all worlds?

Integrating big data and traditional research

| By Greg Mishkin



snapshot

The author uses a case study with AT&T Mobility as an example of how effective integration of various big data streams can enhance the customer experience research process.

Big data is changing the way businesses view market research. The magnitude of the data now available is so enormous and detailed that some predict it will lead to the extinction of traditional market research methods. Our firm rejects the notion that big data will make traditional research obsolete. Instead, we believe that integrating traditional research methods with big data analytics provides an exceptional opportunity to understand what customers are doing, why they are doing it and, most importantly, what can be done to change their behavior.

In this article I will introduce our framework for combining qualitative and quantitative methods with big data analytics and classic experimental design to systematically address a myriad of business challenges. A case study involving AT&T Mobility will illustrate how the successful marriage of big data and traditional research can optimize traditional customer experience research. And the example of a hypothetical research plan to transform passive brand loyalists into active advocates will further explore the value of employing data analytics in concert with traditional research methods.

Tidal wave of big data

Over the past decade, big data analytics has emerged to address the limitations in both qualitative and quantitative research methods. Today, all activity that occurs on the Internet leaves a tidal wave of big data behind. The “exhaust” from these data is enormous and detailed and provides a precise, unprecedented view of people’s behaviors.

Can a survey of 1,000 consumers or a focus group with a dozen participants possibly compete with billions of data points with virtually no survey bias? Yes. Big data can tell researchers exactly how an individual has behaved, with unprecedented precision and depth. What big data cannot do is effectively tell us the motivations behind actions the way traditional methods can.





specifics makes collecting specific and accurate details of these customers' experience impossible. Additionally, surveying every customer is not feasible, so it is difficult to use such research to target proactive actions to specific customers who might be having suboptimal experiences.

While DIL cannot effectively determine the detailed experiences for every one of AT&T's customers, AT&T has enormous amounts of data available from every transaction made by each of its customers. This includes data from: point-of-sale; activations and upgrades; direct and indirect marketing; warranty replacement and repair; call centers; chat and online browsing; usage; network performance; billing; and demographics.

Like many large companies, AT&T's data are stored in dozens of unconnected databases across the organization, making it difficult to see the complete customer experience. To address this, AT&T created ATTain, a platform that brings these disparate data sources together. ATTain also incorporates survey responses like DIL into one data warehouse, allowing an unprecedented view of what customers are actually experiencing.

To understand how this massive data platform works, let's take the example of Mary, a fictitious customer. When surveyed by DIL, we learn that Mary has had three main issues (billing, equipment, dropped calls), with network problems being her biggest complaint. We see that her problems were not fixed the first time she contacted customer care and that overall she is pretty dissatisfied (giving a rating of 3 out of 10 when asked how willing she would be to recommend AT&T to a friend or relative).

When looking at Mary's data in the ATTain database, we can see that she has been a customer for only six months, switching to AT&T from Verizon. She is using an iPhone 4 (the one with known "antenna-gate" problems) and there are two other AT&T phones in the household (a feature phone and a Samsung Galaxy 2). She is on a family plan that does not have shared data or text and the data limits on each phone are inadequate for the amount of data the family is using. We can tell that her iPhone's dropped calls rate is twice as high as the average in her neighborhood. Additionally, we can see that she has only contacted customer care twice (despite reporting more contacts in DIL), once for billing issues and once because of dropped calls. We can also see that she was referred to the warranty department to investigate if there was a device

Knowing what somebody does is only part of the story. Without a clear grasp of underlying customer motivations, marketers cannot successfully modify customer actions. And to act solely on this limited view of the customer can expose both the company and the market researcher to great risk. The only way to limit the risks of ill-advised business decisions is to use every type of data-gathering tool at your disposal to fully understand your target markets.

AT&T Mobility's market research team is leading the industry in big data integration. Every day, this complex organization interacts with its millions of customers using hundreds of different makes and models of devices on thousands of rate plans via 2,300 company-owned stores, 4,000 agent locations and hundreds of call centers. All of these customer touchpoints create lots of opportunities for AT&T to either please or frustrate its customers.

This is why identifying which experiences lead to satisfied customers and which lead to dissatisfied customers is so critical. It is the responsibility of AT&T's customer experience research team to understand the differences in the experiences of satisfied and dissatisfied customers, so that management can take actions to maximize the positive experiences and minimize the negative ones.

One of AT&T's most critical customer experience research studies is Day in the Life (DIL). Functioning as a primary voice-of-the-customer vehicle, DIL was created to better understand the issues customers may face across various channels when dealing with AT&T and how successfully AT&T is addressing these issues. It also provides important insight into best practices in dealing with customers.

Has limitations

While DIL is incredibly valuable, it, like all research, has limitations. Survey length coupled with some respondents' inability to accurately recall

continued on p. 53



Three Ways to Make the Most of an MRA Conference

By Jill Donahue

I've attended a lot of MRA conferences and still find networking to be both the most challenging and the most rewarding part of the experience. If you're attending the MRA Insights & Strategies Conference in Chicago this June, here are three things I've learned that may come in handy:

1. Use Relevance and Repetition

Did you know that networking can be a truly great learning tool? We tend to learn best when the information presented is immediately relevant and when things are repeated. At the MRA conferences, information density will be at an all-time high. Take the opportunity to discuss each session with someone nearby to find out how the content applies to them personally. This will force you to repeat the material and will help you remember it later.

What to say: "Will the information we were just given make a difference for you?"

2. Career Development

Which speaker has your dream job? What is their title? MR can lead to a variety of careers and there's a good chance there are career paths you haven't even considered. Networking provides a unique opportunity to clarify your goals so that you can better verbalize them and, in turn, persuade others that you're a great fit.

What to say: "What do you like about what you do?"

3. Relationship Building

MR is by its nature a collaborative industry, which makes this industry conference particularly valuable. Take

this opportunity to build relationships for business, mentoring or friendship. Have a drink and mingle at the Chairman's reception at ISC and sit with your new friends at The Second City to seal in some quality time. After the conference ends, find a way to be generous with your knowledge or share a common interest with your new connections.

What to say: "Have you made plans for The Second City? Let's meet in the lobby to catch the bus together." ▼

Jill Donahue is MRA's Chairman of the Board and senior brand insights manager at Nestle Purina PetCare. She can be reached at jill.donahue@purina.nestle.com.

Simon Chadwick, Managing Partner, **Cambiar**

Diane Hessian, Chairman, **Communispace**

Jerry Haselmayer, CEO, **SEEK**

Among Our
Keynote Speakers:



Dan Teeter, Director, Vehicle Connected Services, **Nissan**

Dan Roam, **Author**, *The Back of the Napkin*, *Blah Blah Blah*,
and (soon) *Show & Tell*

IF YOU ARE A

CORPORATE RESEARCHER, RESEARCH ANALYST,

RESEARCH EXECUTIVE, OR INNOVATOR,

ISC WAS DESIGNED FOR YOU.

In Chicago, June 4-6, you along with hundreds of marketing research's best and brightest can gather in a unique collegial environment to see and hear nearly 30 hours of competitively selected presentations covering MR's state-of-the-art.



For Corporate Researchers

Learn to integrate and sell the value of marketing research both internally and externally.

For Researchers

Specialists across disciplines share techniques to manage intelligence, uncover actionable insights and communicate research effectively.

You'll also gain a competitive edge through support from your fellow researchers which begins through hallway meetings and best-in-class networking opportunities that can extend for a lifetime.

That's why ISC is how the best researchers sharpen their game.



For Innovators

These often rapid-fire lectures and demonstrations will introduce new possibilities for marketing research due, among other factors, to the digital revolution.

For Research Executives

Manage creative resources and strategies critical to your business success through presentations and closed-door discussions.

Some of our Keynote Speakers

MR
Thought
Leadership
Meet
Our Keynote
Speakers

Dan Teeter, Director, Vehicle Connected Services, **Nissan**



The Connected Car is Here - What's Next? The Future of Mobility and Market Intelligence

Connected cars have taken off in the past couple years as smartphone and tablet technology has made its way to radios and nav screens. What seemed like the distant future (self-driving autonomous cars?) is now just right around the corner. Where is all this innovation going? Find out more about the future of mobility and how this will impact market intelligence.



Dan Roam, **Author**, *The Back of the Napkin, Blah Blah Blah*, and (soon) *Show & Tell*

Show & Tell

1. Lead with the truth and the heart will follow.

When we tell the truth in a presentation, three good things happen: we connect with our audience, become passionate and find self-confidence.

2. Lead with a story and understanding will follow.

When we tell a story in a presentation, three great things happen: we make complex concepts clear, make ideas unforgettable and include everyone.

3. Lead with the eye and the mind will follow.

When we tell a story with pictures in a presentation, extraordinary things happen: people see exactly what we mean, we captivate our audience's mind and banish boredom.

Simon Chadwick, Managing Partner, **Cambiar**



Jerry Haselmayer, CEO, **SEEK**

Diane Hessian, Chairman, **Communispace**



Revolution, Boiling Frogs and Big Data

Researchers live to discover trends, and there are none more important than those occurring within the research industry itself. Based upon a deep qualitative dive involving 33 industry leaders across a variety of modes, we explore the new Ying and Yang of research: emotion and big data. Despite all the hype, many are confused about where big data leads us as researchers. Meanwhile, the need to measure and leverage intimacy, connection and human interaction is on the radar like never before. How are both evolving as apex drivers of successful marketing? And perhaps most importantly, how must researchers act upon these new realities, modernize their approach, evolve their business model and reduce the risk of competition? Over the last five years, Cambiar – this year teaming with SEEK – has conducted studies to challenge assumptions about the future of MR and to address the perceived barriers that limit us as researchers. In this session we will explode three myths, clearly define the challenges facing the industry and offer real life examples of new and “traditional” companies that are addressing these issues successfully through innovation.

Lessons Learned: How to Build a Culture That Inspires Your People

What was once a small MR startup in the suburbs of Boston is now Communispace, employer of more than 500 people worldwide. While their size means they are no longer qualified as a startup, the company has been intentional about maintaining a vibrant startup culture. The 10 year growth experience taught chairman and former CEO of Communispace Diane Hessian how to successfully build and support an inspired team. In this session, learn to use agility, communication and authenticity to develop strong leaders, find ways to stay small within a large company and maintain always-on innovation.

Corporate Researchers

□ Taking Big Data to the Small Screen

Neal Massey, Executive Director, Business & Consumer Insights, **Starz Entertainment**



It is critical for researchers to bridge the gap for management to turn large volumes of data into easily accessible insights. Discover how data visualization and interactive dashboards can insert research into management decisions to transform your business into a data-smart enterprise. This interactive, collaborative, mobile solution adopted by Starz' management and research teams resulted in consistent understanding of customer engagement throughout the organization, shorter research cycles, better communication between managers and improved understanding of insights.

PRC

□ Redefining Community Success and ROI: What Does Success Look Like for the New, Evolved Online Community?

Katy Mallios, Consumer Insights & Intelligence Consultant, **SPYCH Market Analytics** and Drew Senesac, Customer Insights Coordinator, **HSN**



Traditionally, an online customer community is deemed successful



when it lives up to its potential as a dedicated and real-time

research space in which community members provide valuable insights over a period of time. Undoubtedly, when constructed and managed correctly, communities are highly valuable from an

insights perspective - fulfilling the desire for an agile and nimble research tool. What happens when a customer community becomes more than a research and insights hub? What larger impact can a truly evolved online community have on the overall business? What are the new definitions of community ROI? In this presentation, you will see a detailed case study of how SPYCH and HSN's approach to a branded 3-month online customer community proved not only to be the ultimate insights-curation tool, but a means by which customer value and engagement tangibly increased among HSN's best and most valuable customers. Not only will you be exposed to a behind the scenes look at techniques and best practices from an insights perspective - how to inspire engagement, increase participation, fun/insightful methodologies to utilize etc. - but also the positive impact the community had on HSN customers from a measurable and tangible value to the HSN business.

PRC

□ The Zero Moment of Memory: How Yahoo Canada Needed to Understand if Technology Is Helping or Hampering Our Memory

Olga Churkina, VP, Research, **Fresh Intelligence** and Nick Drew, Research Director, **Yahoo Canada**



The nature of human memory is changing.



What we choose to remember - if not what we're actually able to remember - has

changed as digital tools allow us to delegate more to devices and the Web. At the same time, they create new gaps and vulnerabilities in our lives: If we take a photograph of every moment, do we remember it better or worse? Yahoo Canada, working with Fresh Intelligence, developed a research study to uncover and explore the effect of technology on memory. We will review the research approach, which combined brain-imaging technology, in-depth qualitative mobile research and quantitative online research. The results have deep implications for publishers and marketers, across the range of online and offline channels.

PRC

□ Market Research: Safety Net for High-Flying Innovation

Giulia Hamacher, Manager of Primary Market Research, **Motorola Solutions**



When the market research function is designed to absorb risk, innovative ideas flourish as individuals and teams are freed from the fear of failure. The key to innovation is the ability to rapidly assess a multitude of ideas and proceed with those that are most likely to succeed. It is well-accepted that market research delivers the data on which to base these decisions. More importantly, confidence and creativity soar when backed by a solid market research process - just as a trapeze artist gives his best performance knowing the safety net is in place. Several recent product innovations at Motorola Solutions were realized because early-stage research provided validation

and focus. This presentation examines the structure of a market research program designed to encourage innovation, including establishing a process for early screening of ideas that is recognized across business functions and designing research that measures the value-proposition of ideas.

PRC

□ The New Mobile Research: Anyone, Anytime, Anywhere

Meredith Kunza, Head of Quality Assurance, **WhistlerBlackcomb**



With mobile research on the rise, the ability to capture in-the-moment customer experiences has never been greater. But not all mobile customers are alike. How do you target all kinds of mobile users? And how do you get the best results from mobile research, even offline? This interactive presentation will highlight innovative ideas for starting or expanding your mobile research, even on a tight budget. Learn how to integrate your mobile research into a single source of customer insights, and how to create compelling, real-time reports that drive decision-making. WhistlerBlackcomb added mobile research to its voice of the customer program, including capturing feedback from active sightseers, hikers and bikers using tablets to conduct offline mobile surveys on the mountains. With an integrated approach, a small team can now create comprehensive, real-time reports in hours, rather than weeks, and for every level of the organization.

PRC



Analytics & Data Synthesis



Business Leadership & Intelligence



Demographics & Target Markets



Intro to New MR Tools & Opportunities



Mobile & Online



Promoting the Value of MR



Technical Skills & Techniques



PRC Credit

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Brand Building: A Love Story

Gian Gonzaga, Ph.D., VP, Quantitative Insights, and Dan Lazar, President, **Chatter Inc.**

- Small Team, Big Results: How Strategic Partnerships Optimize Insights**
 Kristen Kolb, Insights Strategist, **Clayton Homes**



You don't need a big research team to have big insights goals. But how can a small research team really make a difference? Outsource too much and you risk wasting money; rely too heavily on internal research and you can burn out a small team. By seamlessly blending strong partnerships with internal efforts, lean teams can increase the impact of their insights tenfold. Learn how a one-woman research team transformed her organization into a data-driven company, doubling the amount of research to meet the unique research needs of six business units and over 300 retail locations while cutting research costs in half. Learn techniques to make your research faster and more efficient, how to make the most of a tight research budget, how to coordinate vendors and technology for best results, consistently provide eye-opening insights and prove the value of insights to become a trusted, strategic advisor.

📅 ★ PRC

- What Got You to the Top, Won't Keep You There: Adapting Your Strategy for the Times**

Melissa Barrow, Senior Marketing Analyst; Chris Roden, Senior Manager of Optics and Analytics and Rob Sáenz, Business Intelligence Analyst, **Interstate Batteries**



A major emphasis for Interstate Batteries this fiscal year is the identification of erosion - or decaying revenue and eventually lost customers. In this session, Interstate Batteries will cover the birth of their business and adaptive changes to their service model, the marketing



intelligence team's research approach and trials of getting tribal knowledge out of physical warehouse distribution centers and into a dimensional data warehouse in a usable format for discovery. The session will conclude with a demonstration of the data visualization process they used so that all players would be able to digest research insights, regardless of skill level.

📅 ★ PRC

- Narrowing the Choices: Getting Consumer Insights That Lead to Great Advertising Decisions**

Deanna Meyler, Ph.D., Partner in Charge, Strategic Planning & Smartargeting, **Bozell**



Every research project has its own exciting parameters to work within. Learning from past projects sometimes impacts how we think about and implement similar research in the future. In this case study, a brand wanted to know which creative idea would work best on a national level. The creative team was confident that all ideas were excellent, but there were only three weeks to gain insight - on a small budget. The research solution was an online multi-method research approach of a short survey with follow-up chats among a national panel sample. The obstacle? Respondents loved more than one concept and could clearly articulate why. No clear concept winner required a deeper understanding of how respondents felt each concept was "sticky" and encouraged a greater "call to action" compared to the

others. More advanced statistical analysis revealed a clear winner that thrilled the brand. The process revealed best practices for similar research moving forward. This presentation will share the case study of where the research started, what happened, and how subsequent research has been impacted from what was learned.

📅 → ★ PRC

- Making a Splash: How Vitaminwater Dove Deep and Found Treasure**

Roberto Cymrot, Knowledge & Insights Group Director, **The Coca-Cola Company**



In an era of shortened attention spans and meeting the demands of consumer choice, it is a challenge for any brand to make an impact and stay relevant. Coca-Cola's vitaminwater team identified an opportunity to both grow the ingredient-enhanced water category and evolve with it. The vitaminwater team partnered with Brandtrust to conduct emotional qualitative research into the psychological motivations related to consumption of their products and the essential equities of their brand. The results of the study informed their 2014 brand plan and helped anchor vitaminwater's long-term growth strategy. In this session, learn how to face the chaos of an evolving category and reestablish your brand as a front-runner. Additionally, learn the ways in which a deeper, emotional understanding of consumers can provide the best direction for where to invest to improve your brand.

📅 ★ PRC

- Marketing of Research: Selling Insights Inside the Organization**
 Andrew Ladd, Sr. Manager, Strategic Insight, **Tribune Co.**



Delivering the final presentation is rarely enough to maximize the impact of research in today's ever-complex business environments. Research from the Corporate Executive Board (CEB) shows that superlative insights are rarely enough to break through the complex layers of modern organizations. Internally marketing our work becomes a chief challenge facing today's research professionals. Existing workflows and increased productivity expectations have created a "deliver and dash" relationship between researchers and stakeholders. Developing a research communications position with insights teams helps work "live" beyond project timelines. The Tribune's research team has worked to develop a unique research capability within its core insights team - the research communications function. Join Tribune in understanding the impact of this unique research capability within its core insights team - and how you can improve the impact of your work through some key lessons from their implementation to date. Specifically, learn how consistent communication on key subjects facilitates a "research ready" mentality within the organization, and tools that "socialize" research outputs - because it's more important to internalize, than receive, research.

📅 → ★ PRC

□ **Latinacculturation: Beyond Traditional Acculturation**

Erwin Chang, Marketing Research Manager, **Novamex**



In the traditional acculturation model, immigrants to this country move from low/unacculturated to mid-acculturation to high acculturation and, at some point, probably assimilated. Latinacculturation explains a different process of acculturation found among Hispanics in the U.S. It demonstrates that Hispanic immigrants embrace a very unique U.S.-Latino culture that differs from their origins before they move towards the mainstream culture. In this session, learn how taking into consideration Latinacculturation can make a difference when conducting research in the U.S. Hispanic market.

PRC

□ **Social Network Analysis Tools and Practical Applications**

Barbara Leflein, President and Founder, **Leflein Associates, Inc.** and Michael D. Lieberman, Founder, **Multivariate Solutions**



Go behind the scenes at some of the nation's largest media and PR firms to understand how social media research is evolving on the front lines. By necessity, the young executives in media and PR industries are developing new and exciting ways of listening, managing and tracking social media conversations for the benefit of their brands. Hear their stories to learn what's working and what's missing. Then, learn to use social network visualization tools to make sense of Big Data and present results.

PRC

□ **What's the Difference Between Loyalty and Commitment?**

Rob Klein, President, **Klein & Partners**



Often times satisfaction is a poor predictor of future behaviors because satisfaction is transactional. When you understand how people feel about your brand in addition to what they experience during a single transaction, you will have a better understanding of what they will do in the future. In this session, the origins and the theory of commitment and its use in brand research will be discussed. Using real data from the healthcare industry, attendees will see how understanding a person's level of commitment to a brand tells so much more than simple satisfaction can. Additionally,

an element to learning why people do what they do that is often overlooked is the concept of "market barriers." Just because someone is attracted to your brand does not mean that they can or will actually choose it. Sometimes life gets in the way. When you understand how people feel about your brand, you will be way ahead of the game in marketing to them.

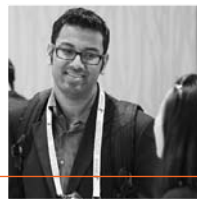
PRC

□ **Telephonic Survey Research: Reviewing the Present and Predicting the Future**

David Dutwin, Ph.D., Executive Vice President and Chief Methodologist, **Social Science Research Solutions (SSRS)**



This presentation will provide information on the relative efficiencies and targeting abilities of landlines and cell phones, both



Predicting Box Office Success by Gathering Emotional Insight of the Modern Moviegoer

Jon J. Penn, Founder and President of the Media and Entertainment Practice, **Penn Schoen Berland** and Rana el Kaliouby, Ph.D., Co-founder and Chief Science Officer, **Affectiva**



Analytics & Data Synthesis



Business Leadership & Intelligence



Demographics & Target Markets



Intro to New MR Tools & Opportunities



Mobile & Online



Promoting the Value of MR



Technical Skills & Techniques



PRC Credit

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the state of the art today and projecting into the near future. It will review trends in costs and cooperation on both frames. It will then focus on a future in which cell phones are the only type of phones utilized to conduct high quality telephonic research and detail the methods by which one can target cell phones geographically and review the status and future status of targeted cell phone lists. Finally, the presentation will discuss the future possibilities of conducting surveys on smartphones and text.



- Using Multi-Faceted Research to Guide the Discovery and Understanding of New Target Consumers**
 Christie Hickman, VP, Consumer and Market Insights, Outdoor Industry Association



As Gen Y emerges as the largest and most diverse population of consumers in history, companies are being forced to rethink their value proposition, brand relevance and marketing strategies. The outdoor industry, like many others, is faced with redefining its relevance to an emerging customer base with unique values and expectations. In order to understand today's new complex consumer, Outdoor Industry Association, the leading trade association for the outdoor industry, is using a multi-faceted research approach to create a holistic picture of its changing consumers. This presentation will focus on obtaining a customer-centric view of your industry/brand, marrying primary research with trends and social media listening to dimensionalize your knowledge and using insights to drive innovation, strategy and best business practices.



- What Do Clients and Suppliers Really Think About Each Other?**

Larry Brown, President & Founder, **Bridgemark Solutions** and John Geraci, President & Founder, **Crux Research, Inc.**



How do clients really choose which research suppliers to work with?



What makes a good client from the supplier's standpoint?

In conjunction with Bridgemark Solutions, Crux Research recently conducted an extensive industry poll among 290 individuals working in the market research field. This session will look closely at both sides of the industry to shed light on what really makes these relationships tick in order to help facilitate more efficient and rewarding relationships between suppliers and clients. This will be a highly interactive session and attendees will be encouraged to share their own experiences and insights.



- The Truth Is In Their Stories - Lessons Market Researchers Can Learn From Journalists**

Tom Bernthal, CEO and Co-Founder and Gareth Schweitzer, President and Co-Founder, **Kelton**



How do you strike the balance between fact and impact, when a good research presentation requires both? The best



journalists are particularly adept at striking this balance, with numerous tools and tricks researchers can lean on to improve their storytelling techniques as well. Kelton's founders, Tom Bernthal and Gareth Schweitzer, made the transition from journalism to research, bringing some of the fundamentals to their new trade. This actionable, how-to presentation will discuss important journalistic

techniques that can help instantly improve storytelling capabilities.



- Kids Do the Darndest Things: Understanding How to Work with Kids and Teens in a Qualitative Research Project**

Pam Goldfarb Liss, President/Big Brain, **LitBrains - Igniting Ideas!**



In this workshop, multiple case study examples will be examined, including creative approaches to working with children and teens in a variety of qualitative research environments such as online, in-person and mobile. The presentation will address nuances with each age group and how to work more efficiently to gain the most productive insights. Learn how to recruit the best possible kid/teen respondents, things to consider in kid/teen qualitative research events, important cognitive differences between age groups, the best kid/teen-friendly research approaches, projective tools and activities tailored for kids and teens, ways to best analyze and report on kid/teen insights, and opportunities to partner with parents for even better context surrounding subject matter.



- Brand Building: A Love Story**
 Gian Gonzaga, Ph.D., VP, Quantitative Insights and Dan Lazar, President, **Chatter Inc.**



It is the holy grail of branding, but do we understand why



someone loves a brand? Defends it? Proselytizes on its behalf? More importantly, how can we measure and research it? In this session, former eHarmony researcher Gian Gonzaga, Ph.D. will demonstrate how academic research

and methods around the psychology of human relationships can help strategy consultants and corporate researchers better study and create consumers' love of a brand. He and company president Dan Lazar will give a sneak peek into Chatter Inc's proprietary research on the psychology of love and the methods that can be used to algorithmically match brands with their highest potential customers - much like dating websites match couples.



- The Roadmap to Consumer Passion**

Dave Kaplan, VP, Bravo Research, **NBC Universal** and Boaz Mourad, Ph.D., Co-CEO, **Insight Strategy Group**



Bravo Media and Insight Strategy Group conducted a study to



understand social, psychological, and behavioral drivers of consumer passion - in particular, its effect on intent to buy, purchases and social advocacy for brands. This research statistically identified the levers that advertisers and brands can pull in order to propel consumers from simply "liking" a brand to "loving" it and from "loving" it to being "passionate" about it. Through interviews with people connected by second and third degrees to a passionate person, the study also gauged how passion spreads and the influence passion has on people within their social networks. Tangible approaches to messaging and engaging with consumers were uncovered in order to create a marketer's "roadmap to passion." Learn passion's role in the future of entertainment media and how its positive marketing effect can be measured.



□ Coding Photos, Videos and Other Mobile Media for Analysis

Dave Koch, Vice President, ADAPT



Researchers are often left with hundreds or even thousands of photos, videos and recordings with no consistent and efficient way to analyze them. This presentation will tackle formatting issues and naming conventions to keep in mind when collecting multimedia formats. Areas covered will include mobile surveying, tips on how to set up questions and instruct respondents to make sure usable media is received, and how a combination of technology and human coders can efficiently reduce multi-media information into coded data files that can be easily analyzed using standard industry analysis tools.

PRC

□ Access Richer Insights Faster While Empowering Enterprise-Wide Collaboration

John Williamson, Founder, 24tru



Turn qualitative insights into searchable data. Stakeholders across the enterprise are able to discover and share relevant research insights within mouse clicks, putting research at the center of the innovation process where it can drive competitive advantage. Harness the power of video for unparalleled richness, gain more leverage from your qualitative research investment and avoid redundant projects due to lack of data preservation and

access. Ignite collaboration around the "voice of the consumer" to put research where it belongs: in the hands of decision-makers.

PRC

□ Emerging Technologies: Webcam Interviews and Their Role in the Qualitative Research Process

Wally Balden, Managing Director, Online Research, Delve (a Focus Pointe Global Company); Thor Falk, President, Falk Research Associates, Inc. and Lorelle Scheibe, Research Manager, Innovation Testing, Kimberly-Clark



Webcam interviews have shown the potential to provide significant benefits vs. in-person. FPG/Delve teamed with Kimberly-Clark to conduct a research-on-research project to see how they compare. In this session learn what steps need to be taken to ensure research objectives are satisfied with this new technology, what research applications are most applicable for webcam interviews, what in-person techniques work best for webcam interviews, how to effectively "connect" with the respondent via webcam, the



technical issues that must be addressed in order to ensure a successful session and how to respond to technical issues taking place in the respondents home environment.

PRC

□ Your Mom Was Wrong - Why You Should Follow a Fast Crowd

Sandy McCray, Insights Curator, Intengo and Scott Tang, Marketing Strategy & Analysis Lead, SapientNitro



It has never been more important for marketers to move from concepts to conclusions to clarity at a hyper-pace, and that means expanding beyond traditional research to find fast methods that won't compromise quality. Let's face it; nobody can create all the iterations that should be considered for any given idea. Crowdsourced ideation will uncover concepts and thoughts you hadn't identified prior to concept screening/testing. Prediction markets harness the power of the wisdom of the crowd and pinpoint successful concepts from the myriad of ideas, removing over-stated purchase intent and flat-line results. Utilizing a general population



sample, prediction markets are fast and efficient, finalizing concept screening/testing results in as little as 10 days. This session will review a Sapient client case study to demonstrate the power and speed of crowdsourced ideation, followed by a prediction market exercise to identify the ideas most attractive for a specific target audience.

PRC

□ Predicting Box Office Success by Gathering Emotional Insight of the Modern Moviegoer

Jon J. Penn, Founder and President of the Media and Entertainment Practice, Penn Schoen Berland and Rana el Kaliouby, Ph.D., Co-Founder and Chief Science Officer, Affectiva



2013 was a record year at the global box office, yet it's never been harder for Hollywood marketers to win over the hearts, minds and attention of moviegoers. With enormous pressure on Hollywood marketers to show the social, monetary and free time value of watching a movie at a theater on opening weekend, 80-85 percent of all spend in



Long-Term Digital Community for Deep Insights
Erin Barber, VP, Online Immersion, C+R Research
and Kerry Hecht, Director (US), Dub



Analytics & Data Synthesis



Business Leadership & Intelligence



Demographics & Target Markets



Intro to New MR Tools & Opportunities



Mobile & Online



Promoting the Value of MR



Technical Skills & Techniques



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theatrical marketing campaigns is on TV ads, which now must engage moviegoers in new and different ways given the changing environment. The old adage that your TV campaign could just drive awareness and purchase intent is over; campaigns today must break through to create social and emotional engagement and purchase urgency. Penn Schoen Berland (PSB) and Affectiva will show a comparison of all measures to box office sales and will prove that new measurement methods are needed to understand the modern moviegoer and ultimately help movie ad companies maximize returns from their marketing campaigns. In addition, they will illustrate the synergistic benefits of testing movie ads with both PSB's survey measurement system and Affdex automated facial coding through case studies that bring the utility of this new measurement system to life.

 PRC

□ **Meet Generation World**
Chip Walker, Director, Global Brand Strategy, **BAV Consulting**



New research from BAV Consulting conducted in the U.S., Brazil and China finds that many consumers hold views that are the opposite of what they tell us. In this session, the audience will learn how global consumers respond consciously and unconsciously regarding their personal values and to a range of brands, how to understand a new global consumer with a psyche that is complex and conflicted, and how brands like Land Rover and Virgin have taken advantage of growing consumer conflict through a new branding approach called "Brand Paradox."

 PRC

□ **Moment-of-Truth Market Research: iBeacons and the Possibilities of Mobile**

Venkat Rajagopal, Director, Business Development and Sriram Subramanian, CEO & Co-Founder, **ZoomRx**



In the summer of 2013, Apple announced a key new feature in iPhones and iPads: iBeacons. The basic functionality enabled by iBeacons is micro-location targeting. By knowing the micro-location of a customer, companies can push highly targeted and relevant content to the customer's smartphone. Applications of this technology are many, but the most interesting possibility is conducting Moment of Truth (MOT) research. By leveraging iBeacon technology, researchers can survey customers directly at the moment of truth for a much lower cost than traditional MOT research. This session will focus on: 1) Familiarizing researchers with the emergence of iBeacons, 2) Specific applications of iBeacon-technology in retail and healthcare market research, 3) Best practices for using iBeacon-technology in regards to privacy and security, and 4) A live demonstration of iBeacon-technology enabled market research.

 PRC

□ **Did You Save Room for Raspberry Pi? New Research Modes Fueled by the Makers Movement**
Chris Robson, PRC, Senior VP, Research Science, **ORC International**



Over the last few years a movement of amateur inventors - known as "Makers" - has radically altered the investment and skills needed to fully realize an Internet connected hardware device. Central to this is the open availability of

cheap and accessible platforms such as the Arduino and Raspberry Pi. The confluence of smart devices and open-source hardware development opportunities brings exciting new opportunities for researchers to move away from the tired paradigms of questioning and surveys, towards new modes of digital ethnography where we watch and measure rather than ask. Want to build a biometric feedback device? Need to count who is looking at a shelf display in a store? Could you use custom audience feedback devices? Would you rather measure what people are actually doing rather than ask them questions afterwards? Better yet, do you want to do this all for \$50? The opportunities for brand new research modes are only limited by your imagination.

 PRC

□ **Tuning in to the Voice of the Competitor (VOTC): Going Beyond Google**

Sean Campbell, CEO, **Cascade Insights**



Bring the Voice of the Competitor's (VOTC) customers, partners, and influencers into your building. During this presentation attendees will learn how to use over 20 web-based tools and sites to better collect and analyze OSINT from the Web. Attendees will also take away knowledge of how to effectively gather and analyze information about a competitor's customers and partners, vary VOTC collection and analysis efforts based on the geography or region targeted, methods for effectively integrating competitor interviews into VOTC efforts, and ways in which VOTC contrasts with VOC research and lessons that can be learned from this comparison.

 PRC

□ **Unleashing the Power and Dynamics of Prediction Markets**

Linda Rebrovick, CEO, **Census Point** and Julie Wittes Schlack, SVP, Innovation and Design, **Communspace**



This session will describe the value of predictive market research in the broader trend towards engaging gamification techniques for consumer collaboration. It will begin with the global outlook for predictive market technology over the next three years and the importance of predictive market research methodology for the future of the industry. Case histories will illustrate how several of the largest global companies have used prediction markets in support of everything from prioritizing features and new initiatives to optimizing concepts, messaging, and promotions.

 PRC

□ **Visual BI - The Better Way to Present Data**

Rudy Nadilo, President, North America, **Dapresy** and Aaron Reid, Ph.D., Founder & Chief Behavioral Scientist, **Sentient Decision Science**



It's time to ditch PowerPoint for research reporting. New visual BI technology can provide visually engaging, dynamic reporting capabilities in an easy to use, cost effective manner. This market research information strategy is organization friendly, makes data more operational and deploys data in a visually engaging manner via personalized "role based" dashboards and infographics. There will be visual examples of how data can be deployed with actual client case studies of how tracking research with continual weekly, monthly and quarterly data collection are enhanced with automated reporting.

 PRC

Research Executives

How to Think and Lead More Productively

John Canfield, President, **Canfield & Associates**

CLOSED SESSION: EXECUTIVES ONLY



This session will introduce and practice John Canfield's acclaimed *Good Thinking* curriculum. This is an interactive, hands-on working session open only to research executives. Participants will practice new approaches and tools in small groups, working on issues from participating leaders.

Part 1: Good Thinking Curriculum Kick-Off

Introduction to the curriculum, presentation, provision of materials and assignments, etc.

Part 2: Executive Think Tanks

Attendees break into groups to discuss curriculum, create innovation solutions, etc., as John works with each as prudent.

Part 3: Executive Think Tank Outcomes

Attendees from the earlier session regroup to share learner outcomes.

PRC

Executive Leadership and Market Research

Rob Stone, Ph.D., CEO, **Market Strategies International**



See isc.marketingresearch.org for more information.

Long-Term Digital Community for Deep Insights

Erin Barber, VP, Online Immersion, **C+R Research** and Kerry Hecht, Director (US), **Dub**



Learn how to leverage digital communities for quick and insightful research. We'll look at



the online community through multiple case studies (retail, quick serve restaurant and consumer packaged goods), diving into specific activities that include mobile, webcam and co-creation. Through our research in several 4-6 month communities, we were able to dig into shoppers' and consumers' experiences and motivations to find out what commands attention online and in stores, how social media is being used by consumers for brands and in stores and what consumers - especially

Millennials - think of brands' ideas and marketing.

PRC

Expanding Our Capacity to Achieve Business Goals Through Mindful Awareness

Qua Veda, IT Market Research Analyst, **Intel Corp.**

CLOSED SESSION: EXECUTIVES ONLY



In this session, Qua Veda will describe how employees at Intel began to apply mindful awareness practices to meet increasing demands at work while improving their wellbeing. As employees shared their experiences with colleagues, the program expanded and evolved. Within a year, hundreds of engineers, knowledge workers and managers had completed the 9-week series of sessions, called *Awake*® Intel. The *Awake*® Intel program integrates intentional awareness with intellectual and emotional understanding. This wisdom is then applied to the challenges of the workplace and the elevation of one's wellbeing and happiness. Qua will provide

recommendations and considerations for implementing a mindful awareness program in your workplace.

PRC

Privacy By Design: How to Become A Trusted Research Partner

Stuart Pardau, Managing Partner, **Law Offices of Stuart L. Pardau & Associates**



The maintenance of robust privacy/data security policies and practices is a key component of being a trusted research partner. This session will emphasize the significance of the privacy by design and the two primary principles which underscore it: simplified choice and transparency. The session will cover the need for simple, clear and transparent privacy policies and clear language for registration and respondent engagement. We'll address privacy audits of your firm's practices and regular training of your employees, the creation and maintenance of protective client and vendor agreements, the connections between technology and privacy, best practices and

Choose Your Own Adventure // Corporate researchers work to integrate MR into decision making processes. Should you?

Taking Big Data to the Small Screen

Neal Massey, Executive Director, Business & Consumer Insights, **Starz Entertainment**



Analytics & Data Synthesis



Business Leadership & Intelligence



Demographics & Target Markets



Intro to New MR Tools & Opportunities



Mobile & Online



Promoting the Value of MR



Technical Skills & Techniques



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industry requirements that include MRA's *Code of Marketing Research Standards* and risk management strategies, including obtaining adequate insurance.

📅 ★ PRC

□ **Implementing an Early Warning System to Monitor Trends Beyond the ACA**

Rick Britton, Senior Market Research Consultant and Douglas Dunham, Market Research Consultant, Health Care Service Corporation



With the health insurance industry in a state of disruption from Affordable Care Act (ACA), what other environmental



changes could affect the landscape of health insurance in the next 3-5 years and beyond? The HCSA trends management program is designed to be an early warning system for trends that are or soon could be affecting consumers, employers, providers or brokers. By sensing upcoming developments from within and outside the health care industry and understanding their implications, Blue Cross and Blue Shield plans can align strategic initiatives to stay ahead of the market and competitive curve. The objectives of this session are to discuss why understanding evolving, imminent and longer term trends are important for health insurance carriers; exploring how to identify, prioritize and understand long range trends that can affect the industry; presenting ways of integrating trend knowledge in a strategic manner; and identifying ways to disseminate relevant trend insights to key internal stakeholders.

📅 ★ PRC





Networking Opportunities at ISC

Expo Reception

Wednesday, June 4, 5:15-6:15 PM

One of the main reasons market researchers come to ISC is to check out the latest MR products in person and to meet their champions face-to-face. Grab a light bite and bond over cocktails while perusing cutting-edge product, service and technology solutions.

Designated Expo hours are also offered between education sessions to allow you plenty of time to visit with exhibitors

Opening Night Reception

Wednesday, June 4, 6:30-8:30 PM

The Chairman's Party has become an attendee favorite! Cocktails, a dinner buffet and live jazz and blues set the stage for a fun and festive atmosphere. This is the perfect venue to catch up with old colleagues and make new friends.

One ticket included with Conference registration. Guest tickets available for \$250 each and include the Expo Reception.

Colleague Connections

The Colleague Connections program is designed for first time conference attendees. As part of the Connections program, you will be paired up with a veteran member and or industry leader who will help you make new business acquaintances and get the most out of your conference experience. Whether you simply want someone new to meet and talk with or want to connect around a specific interest, the Connections Program will help you achieve your goal.

A full belly laugh is a good icebreaker.

Evening at The Second City
Thursday, June 5, 6:30-10 PM

Can you imagine being able to say you saw Chris Farley perform Matt Foley, Motivational Speaker on stage before it ever hit SNL? Or that you saw Tina Fey, Stephen Colbert or Mike Myers before they were famous? With its ever increasing roster of comedy superstars, The Second City is where up-and-coming comedians cut their teeth... and where you will be on Thursday night!

Prepare to laugh until you cry over original scenes, songs and hilarious improv in two acts, written and performed by six of the nation's best comedians. The entertainment, full service bar and dinner buffet are for ISC attendees and their guests exclusively. Transportation will be provided to and from the theatre.

One ticket included with Conference registration. Guest tickets available for \$150 each.

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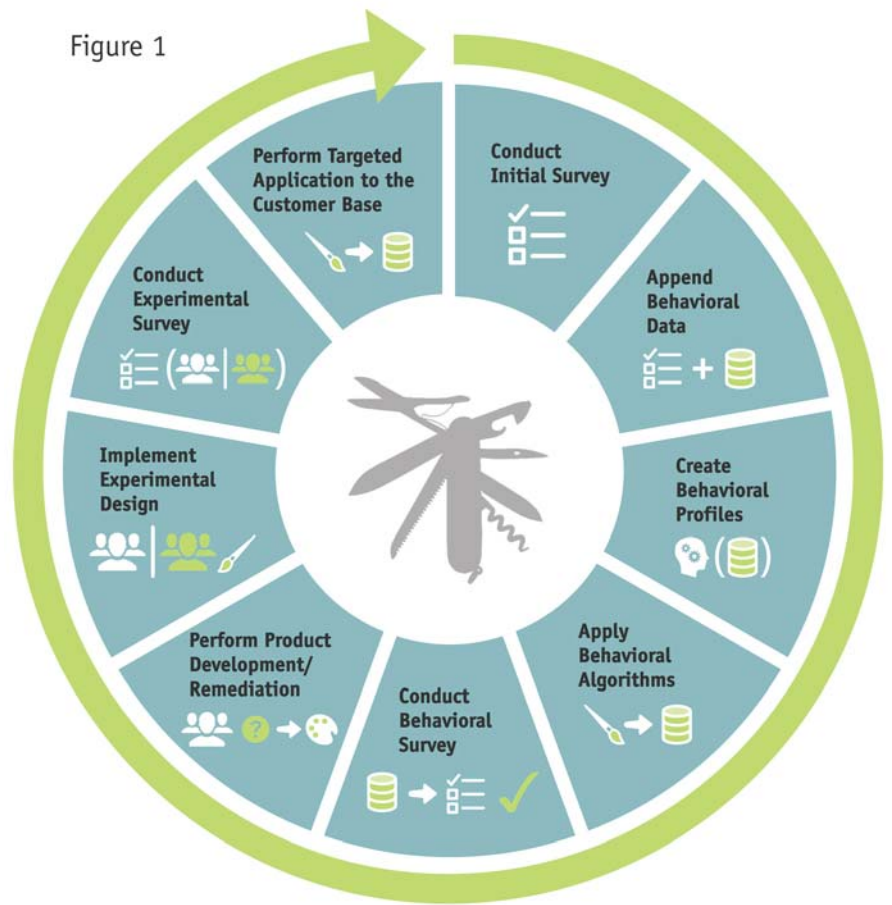
ontinued from p. 35

issue causing her dropped calls but she never completed the discussion with the department.

Mary's DIL responses are critically important, as they are the only insight into how Mary feels about AT&T and how responsive AT&T has been to her issues. Mary's ATTain data are equally important as it gives insight into details that Mary could never accurately report in a survey. These details allow us to better pinpoint underlying causes of her issues (in this case that her phone is likely causing many of her problems). Combining DIL with ATTain affords an unprecedented view into what Mary is doing, why she is doing it and how this experience is impacting her satisfaction.

While Mary's example is interesting, the true value is realized when tens of thousands of customers' experiences are similarly analyzed. Such analysis allows AT&T to detect patterns of behaviors that are indicative of satisfied and dissatisfied customers. Algorithms can then be created to identify these patterns in the ATTain data

Figure 1



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of all AT&T customers (not just the ones who responded to the DIL survey). As patterns are detected, the satisfaction measures from DIL can be projected onto all AT&T customers, effectively allowing AT&T to identify which customers are at risk of becoming dissatisfied and to take proactive actions to change negative experiences into positive ones.

Nine-step framework

This kind of integration of big data analytics with traditional research can be implemented across industries. Our firm has developed the Continuous Improvement Cycle to do just that. It is a flexible, nine-step framework that does not require rigid application (Figure 1) of each of the steps. In fact, many companies may choose to implement only part of the cycle. AT&T, for example, has implemented the first four steps thus far. However, understanding how all of the steps fit together allows companies to better conceptualize how to get improved utility from their traditional research methods through the integration of data science analytics. As we move through the later steps in the following explanation, we'll use a hypothetical case of another large telecommunications carrier that wants to use its internal customer data to improve customer experience and decrease churn.

Step 1: Conduct initial survey

The first step is to understand the customer experience from the perspective of the customer. To accomplish this, a quantitative survey of a representative sample of customers can ascertain and quantify satisfaction levels and churn propensity, resulting in crisp, differentiated customer segments that identify which customers are satisfied and which are not.

Research like this is fairly routine and the surveys are, on their own, fairly unremarkable. At AT&T, this research exists in the Day in the Life study. The results can give management an idea of what some of the main issues might be but because the survey is only administered to a small percentage of the customer base, the results cannot be readily used to target solutions to individuals with specific issues. Traditional surveys can give only limited insight to aid marketers in taking concrete actions to modify or

encourage individual customer behavior. But this is only Step 1.

Step 2: Append behavioral data

As described earlier, combining observable behavioral data with traditional research can yield much richer insights than either approach independently. Therefore, the next step is to pull together all of the behavioral and transactional data that are available for the customers who responded to the initial survey. At AT&T, this data lives in the ATTain platform but often

the data need to be culled by accessing numerous divergent databases throughout the organization. These could include network data, POS data, online usage, customer service, demographics, billing data, seasonality information, store locations and lifetime value as well as activations, returns and exchanges. Once assembled, the data are combined with the customer experience data for the respondents, resulting in a database that contains what the customer did as well as why they did it and how they feel.

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Step 3: Create behavioral profiles

This new and far richer database is a good starting point but its use is limited as it only contains data for a small minority (albeit a statistically-representative sample) of customers. To make this database really powerful, it must contain information on nearly all customers. AT&T knows that it clearly is not economically or operationally feasible to obtain customer experience and churn propensity scores by surveying the entire customer base. Therefore, these scores are projected to the entire non-surveyed customer base. To successfully project attitudes, profiles are created that identify the types of experiences and behaviors that are common to each segment and that differentiate segments from each other. Then these profiles are translated into algorithms that assign various behavioral patterns to different groups.

Step 4: Apply behavioral algorithms

Once these behavioral algorithms are created, they can be applied to any behavior pattern, placing individu-

als into the appropriate segmentation bucket. In AT&T's case, the algorithms were applied to the behavior patterns of all members of the ATTain platform, attempting to project the segmentation criteria (in this case, customer satisfaction and propensity to churn) to every customer regardless of whether s/he was initially surveyed.

Step 5: Conduct behavioral survey

Next, it is time to optimize. The initial algorithms are sometimes insufficient so we draw a random sample of customers who are flagged to be from the targeted segmentation of "poor customer experience and high propensity to churn" from the entire scored customer base. We then use the same survey instrument administered during the initial survey for this new sample to confirm that the algorithms are accurately identifying these dissatisfied customers. If the survey identifies flaws in the algorithms, then the models may need to be revised or it may even be beneficial to conduct small qualitative analyses to better understand which

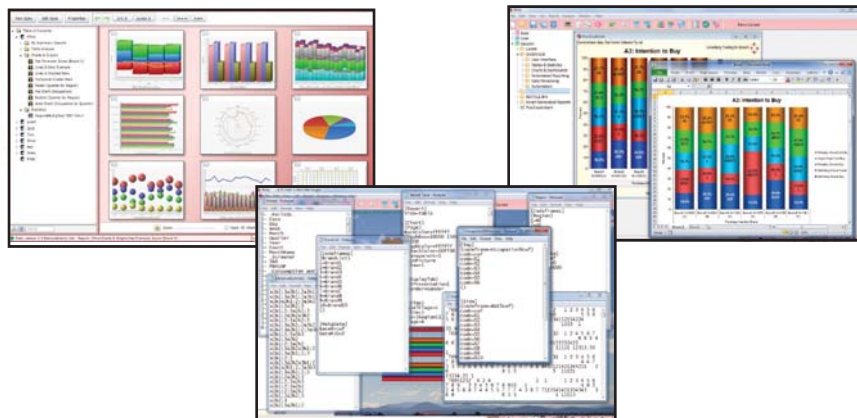
factors or additional datasets may be missing. It is important to iteratively improve the algorithms until the behavioral survey correctly identifies the targeted segments. By applying the verified algorithms, we obtain a comprehensive database of all of our hypothetical carrier's customers, containing details of what they did and how they feel.

Step 6: Perform product development/product remediation research

Having a validated and comprehensive database is exciting but it is not enough to simply know which customers are satisfied and which are not. To add meaningful value, the carrier needs to understand what can be done to change these customers' behavior and increase their satisfaction. Market Strategies has found that qualitative exercises are ideal for deep exploration into what motivates customers to act the way they do. Existing customers that we have confirmed (based on the behavioral survey) to have "poor customer experience and high propensity to churn" can be recruited for qualitative research.



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Through skilled qualitative moderation, as well as integration of existing innovation/ideation programs, we can identify new products and/or changes to existing products and marketing that are likely to positively impact the customer experience.

Step 7: Implement experimental design

With qualitative research there is always the risk of making significant and/or expensive product changes based on the opinions of too few participants. But using the fully-scored customer database (Step 3), we can now fully test and quantify these ideas by fielding a random sample of dissatisfied and likely-to-churn customers, then dividing this sample into control and experimental groups. It is important to note that, like all experimental designs, the new product or marketing changes should only be presented to the experimental group and not to the control group.

Step 8: Conduct experimental survey

After a reasonable period of time, we then give both the experimental and control groups the same survey instrument used in the initial survey and compare the satisfaction and churn propensity scores for both groups. This determines, with a very high level of certainty, how much greater are the experimental group's experiences. Once the impact of the new product or remediation has been positively determined, we initiate a classic cost-benefit analysis. If the benefits significantly outweigh the costs, then we can formally recommend the suggested new product or existing product changes to the management team for adoption – knowing, in advance, how beneficial this suggestion will be.


Step 9: Perform targeted application to customer base

Once management approves, the new product or change to existing products and marketing can be strategically applied to the customer base – but not to the entire base. Rather, this change should only be targeted to those customers who are known to be highly loyal but not advocating. Doing so assures that only those customers who have been proven to benefit will be given the

change, ultimately maximizing positive impact while minimizing risks.

Maximum amount of impact

At its core, marketing is about action. The main goal of marketers is to drive actions that provide the maximum amount of impact to their organization while minimizing risks, both organizational and personal, associated with these actions. Using a holistic framework like the Continuous Improvement Cycle to integrate traditional qualitative and quantita-

tive research methods with big data analytics can help marketers systematically address a myriad of potential business actions and challenges while maximizing the positive impact to the business and minimizing the risks associated with making ill-advised marketing decisions. 

Greg Mishkin is vice president, communications at Market Strategies International, an Atlanta research firm. He can be reached at greg.mishkin@marketstrategies.com.

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snapshot

Eric Whipkey makes the case for incorporating journalists and their skill sets into the MR realm and outlines what an insights department focused on telling stories might look like.

●●● data analysis

Look, here's the story

What can journalists teach us about crafting more compelling research reports?

| By Eric Whipkey

Marketing research and journalism have many things in common. Among the most noticeable at the present time is the extreme change that both are currently undergoing. Unfortunately for many journalists this is not a growth story. For market research though, the change involves methods, expectations and also growth. The industry (both client- and supplier-side) is thriving. Consumer insight, predictive modeling and innovation are not just buzzwords, they are pressing business imperatives. This growing need for consumer insight in business could also lead to some greener pastures for journalists who are willing to redirect their intellectual curiosity toward different kinds of stories. The type of stories that business leaders are longing to hear are investigative tales of their customers and their needs and how they relate to the products and services that they are producing.

To move toward this future in which stories and the ability to effectively tell stories are part of the mar-



keting research function's deliverables, researchers will need to adapt and acknowledge several new realities. These include:

- changing and evolving technology (e.g., mobile, social media, natural language processors, advanced algorithms and artificial intelligence (AI), augmented reality, Google Glass, apps, etc.);
- the role of the customer in organizations and customer experience;
- changing and evolving methods for conducting market research;
- new players in the market research space (e.g., data integrators, programmers, IT, etc.); and
- stories, journey-mapping and design (more engaging visualizations) taking center stage.

The advent of the above factors means that marketing research is becoming more and more accessible to DIY researchers and so the value of the traditional market researcher is in danger of being diluted.

Executives increasingly do not care for nor expect research to meet the standards set by science (e.g., statistical significance for every finding). As much as many of us hate to admit it, "directional" is becoming good enough for many business leaders (depending upon the decision, of course). The new expectation is that market research has a business mind-set intent on providing quick and actionable insights that add to the bottom line, rather than one focused on hypotheses testing, test-and-retest and taking three to six months to complete a project.

It is still OK to affiliate with the scientific but it is no longer acceptable to "hide behind" the need for more sample or greater fidelity. Nearly every industry now claims to have fast business cycles, thus intensifying the need for quicker turnaround and demonstrable ROI from research and insights endeavors.

This requires researchers with a head for business who can craft compelling nonfiction stories. It is something that looks very much like old-school investigative journalism or, more specifically, progressive journalism or computer-assisted journalism.

In a YouTube video, Robert Benincasa, a practitioner of computer-assisted journalism for National Public Radio, talks about his approach, describing it as "using data analysis to tell help tell a story." In addition, he references finding "trends and associations in data that matter" and talks about "mashing up" various databases to look at market share comparisons and create data vi-

ualizations. Computer-assisted journalists, he says, also regularly use databases and tools like SPSS, SAS, etc.

Sound familiar? There is much to learn from these types of journalists. They have been doing what many in market research are now talking about as new or revolutionary for some time. So let's make some space for them in our profession.

New line of work?

Am I saying that "we" typical market research professionals should find a new line of work and hand our jobs over to journalists? No. But it would not hurt if there were a role for journalists within market research or insights departments, perhaps with job titles such as storytelling director or chief research editor.

If we do in fact need their skill sets, we should be hiring them now. We all know that there are plenty of skilled journalists looking for work as traditional newspapers close, everything goes digital and news organizations consolidate. Even better, let's build a new, nimble infrastructure that will allow them to apply their valuable skill sets in support of generating quick-to-the-boardroom research stories.

If you are going to tell stories, it is not all about content and data anymore. There is a real role for design as well. This includes:

- the layout of analyses – beyond graphs and charts (infographics are more like it);
- creating one- or two-page summaries, heavy on design and infographics; and
- presentations that are compelling and interesting to watch.

We all know that the days of the 100-page PowerPoint decks are gone. Gone are the methodical presentation structures: methods, then analysis, then findings, then conclusions and recommendations at the end. These days, execs want to cut to the chase: What did we learn from this study? What do you recommend? How will that impact the bottom line?

That other stuff? It goes to the appendix.

OK, so maybe the 100-page decks won't be completely gone. The details will still be needed at the operational level. But let's be real: the executives you are presenting to do not want to see all of those slides. That information has a place, just not during your presentation or dropped into your CEO's lap.

If we were to start adding journalist storytellers into our ranks, what kind of organization would we be talking about? What would it look like? It would have a

rather unorthodox structure, with the methodologist sitting in the middle and acting as key strategist and research decision maker. He/she would decide upon how the research is designed, pooling his/her business knowledge to design a methodology that is both inclusive of internal clients and allows for the analysts, reporters, designers and storytellers/editors to craft a compelling non-fiction story.

The roles of the others wrap around the methodologist so that they are fully integrated in the methodology. There are effectively two layers of management:

The research design and methodology layer: engineers how the research will be conducted, crafting the sample, deciding on the proper tools to use (surveys, technology, experimental design, etc.) and basically ensures that the research is done right.

The story/editorial layer: crafts how the research story is told,

including its findings, conclusions and the delivery of the recommendations.

If you are going to tell stories, it is not all about content and data anymore.

As in any organizational structure, there are workers or doers and there are deciders. In this model, the doers are the analysts, reporters and designers. The analysts directly support the research and the methodologist, whereas the reporters and

designers directly support the editors or chief storyteller. At some point they are all working together to ensure that the final research product is actionable and comprehensive. This is when the entire team comes back to together to write the reports, tell the story and present results to stakeholders. Figure 1 shows how this structure might look.

The arrows in the organizational chart indicate how all of the players would work together in two-way feedback loops. The entire team works together to build what should be powerful storylines with very actionable client-led data. What the chart does not show is the co-creation with the client that should be built into the process. Since we should have a strong journalistic ethos built into our organization, from analyst, reporter and designer to methodologist and editors, the client and other sources will have been consulted all along the way from research fielding to storyboarding and finally in crafting the final story/report.

Beyond the storytelling required for the completion of actionable research projects, there are other major initiatives that this structure will support. The entire team must work together to:

- build a research plan for the year;
- respond to RFPs; and
- develop portfolios of services/new research methodologies/tools.

When it does come time to get to the research, the research methodologist works with the analysts to design the research but the reporters, designers and storytellers are still involved, attending all project meetings. Even before the research begins, the reporters, designers and storytellers can work with the analysts to build a story structure based upon the research plan. These story structures or alternative storyboards would be based upon the methodologist's and analysts hypotheses. Basically, what stories could be told based on a given research design?

Research methodologists and the analysts field the research and analyze the data. While this field-

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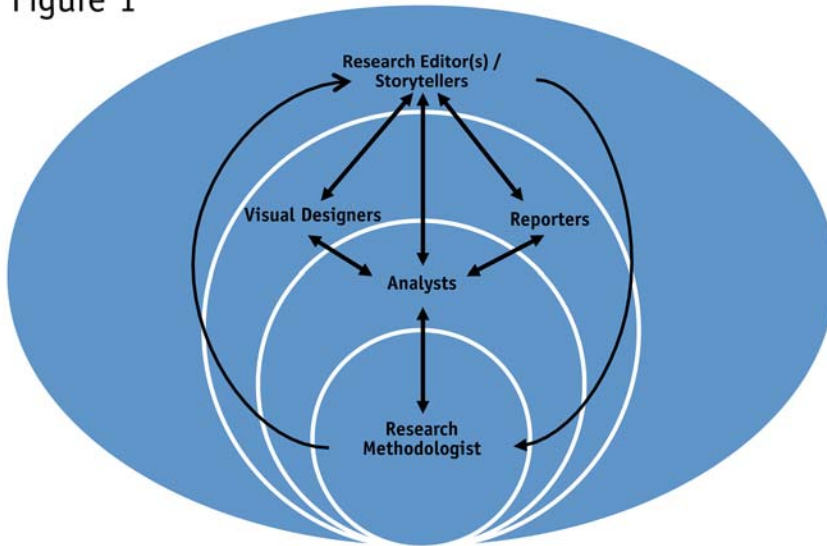
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Figure 1



work is going on, the reporter and designers collect art, photographs, assemble sources, conduct external interviews and write content that supports preliminary findings and the logic beyond the hypotheses being explored. They may also design infographics and visualizations for use with various types of comparative research (conjoint, package

testing, logo design testing, etc.). As the research takes shape, these data visualizations are fit into the report in the way that helps to support the final story.

May not be feasible

I realize that this is a new way to think about running a market research department or company and

may not be feasible, especially in established departments/organizations. But with the tools available today, such as social media analysis; text analytics; numerous robust secondary research providers; agile market research techniques and even evolving AI tools like Watson Analytics, we are approaching a market research reality that could drastically decrease the fielding time for major market research projects. This is a good thing for the industry and our clients because the expectation is for faster and faster turnaround on projects. It is my hope that the organizational structure and skill sets proposed here will generate some thinking around new ways of applying our trade and/or allow for quick adaptation to the world of agile and journalistic market research that will soon be at hand. ①

Eric Whipkey is assistant manager member satisfaction and experience metrics at Navy Federal Credit Union, Vienna, Va. He can be reached at 703-727-1125 or at eric_whipkey@navyfederal.org.

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Socializing data vis

Why people come before data every time

| By Bitsy Bentley



snapshot

A director of data visualization offers her strategies for shaping and presenting research information.

Because data visualization has roots in graphic design, there is a temptation to view visualizers as artists – with all of the baggage that may imply. We think of the lonely painter in an unheated garret, turning out tortured masterpieces that may only be seen after his or her untimely death.

Sorry, but that is not a data visualizer.

Visualizers may find it convenient to cultivate the “solitary artist” mystique (“Leave me alone – I’m creating!”) but the truth is that data visualization is inherently social.

Just look at the words we use to talk about the visualization process: share, articulate, describe, explain. Every one implies an audience we need to connect with – someone who has to receive what we produce in order for it to be complete and successful.

In the end, visualization is as much about users as it is about data. While art is theoretically an unfiltered expression that the viewer can take or leave, data visualization has defined users with specific goals in mind. It may be extraordinarily beautiful but that is a happy accident, never its primary goal.

My approach to visualization revolves around four questions. You can quickly see that three focus on users, while only one is primarily about data: Who is my audience? What decisions need to be made with the data? How will my audience experience the data? Is my data set dynamic or fixed?

So, to visualize, we need to understand our audiences before anything else. We can have all the data in hand but without at least a basic view of our users, we cannot build even the first wireframe.

The first thing to understand about user groups is that they often are not the same as the departments and functional teams that they occupy in their companies. People with very similar goals, data needs and levels of visual comfort may reside in completely different parts of the company. A brand manager and product manager may need almost identical visual information, outlining the features and benefits of the products they develop and sell,



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though they use this information in different ways.

By the same token, people who work together every day and are theoretically on “the same team” can require totally different visualizations. Some researchers are very focused on detailed data delivery and are happy to get in the weeds. Others are looking for a more concise synopsis of findings so they can look at one study in the context of many others.

As a visualizer, then, it is best to throw out all assumptions and test your audiences on the things that need to shape your approach. You need to know their pain points when it comes to getting their work done; how comfortable they are using data to drive decisions; their level of visual sophistication; and what achievements will make them feel good – and get recognized by their peers.

For significant projects, we hold in-house brainstorming sessions with the users themselves, collecting information on simple Post-it notes and gradually developing specific personas that define the user groups. Essentially, this is a data visualization segmentation, drawing on an expertise that GfK uses on consumers but applying it instead to the marketers and market researchers themselves.

At the highest level, our user groups usually fall into two camps (Figure 1):

Analysis audiences: The researchers and other “data heads” who want and need to make deep dives into the data, play with it and ultimately develop stories.

Story audiences: CEOs, CMOs (some, not all) and others who only want the topline facts they need to do their jobs and have little interest in exploring the numbers.

Traditional market researchers – who often drive the data visualization project – are analytical people; approaches designed to meet their needs may leave “shortcut seekers” confused and even turned off. A tabular presentation is not going to make sense to them; instead, they need data graphics that draw out and annotate the important details, infographics that provide engaging snapshots and scorecards that use bullet charts to deliver contextual information in a compact way. Analytical

Figure 1

Defining Data Visualization

Some visualizations are best used to find stories in the data.

Others are better at telling stories to a broad audience.



Figure 2

Great Data Graphics Have Three Layers



users, by contrast, will thrive with box plots, network diagrams, perceptual maps and tabular data.

Insight can come from anywhere

We are seeing a sea change in how clients approach insights and analytics. Marketers and researchers are recognizing that insight can come from anywhere in their organizations and that other departments may even be pitching insight generation to business decision makers. With MR budgets shrinking, it becomes more important to bring insight back to the payors. Research departments are just one part of a web of services supporting a brand or product – and they need to adjust their approach to data accordingly.

Successful insights and analytics organizations we work with are being proactive and becoming more intimate with business decision-making, acting

as partners with those who make choices and control budgets. Anybody can give you a set of tabs but formatting that information in a way that will drive meaningful change in your company requires empathy and intelligence. This is the analytical folks learning to speak to and accommodate the story seekers.

One crucial mistake that visualizers sometimes make in presenting data to story audiences is to separate headline findings from the data graphics that support them with evidence. For an audience that may be resistant to making data-driven decisions, obfuscating the numbers can make it harder for them to be convinced.

The best way to engage, convince and activate more passive data users is to make your findings crystal clear. If you do not, your audience may not recognize the value in the data; if you tell

them that revenue is up 225 percent but do not show the line graph with that big leap, you may be creating a subtle but real believability issue.

The best data graphics feature three essential layers of information (Figure 2):

Context: Setting the stage for your data – the backdrop for your details

Detail: The POW! in your data – highlight it for clarity

Annotation: A simple description of why these data are important

The context/detail/annotation approach points audiences to the meaning and significance of a graphic without a voice-over or a smart person to explain it. If that significance is not clear, we are failing at a core function of visualization: separating the signal from the noise.

How do we format the data graphic so that it stands alone but also includes the right information to make a good decision or help the end client look good in front of his or her boss? As we approach revising data graphics, we employ a “reduce, refine, enhance” process – which is connected to our context/detail/annotation philosophy.

The first step is always **reducing the data graphic to its essential elements**. How much visual noise you can remove? Is the outline or gradient in that bar chart necessary to understand the deeper meaning of the graphic? What about the black outlines around that table – could they be softer in a light grey or can we get rid of them altogether? We like to employ a single-color or monochromatic color scheme that employs tints and shades of one color to create a neutral ground.

The refinement step is all about **bringing the detail layer into the data graphic**. Is the most important detail easy to see? Did we use a contrasting color or a different line weight to highlight the key element? Researchers will often rely on bright circles or squares but if your background information is subtle enough, it is much easier to bring out the detail without being too loud.

The final step is the icing on the cake: **enhance the data graphic with meaning**. Add in appropriate annotation of the key finding. By integrating the insight directly into the data graphic, you do not need to fret that your audience will not understand what

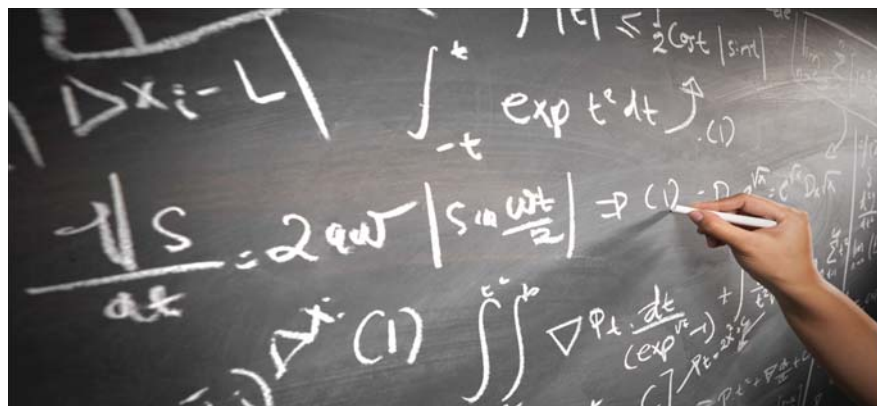
they are looking at. Employing this technique over time has the added benefit of training your data audiences to have a more sophisticated view of data graphics in general. By pointing them to the detail that you, as the analyst, know to be salient, you empower them to make their own data discoveries.

Shaped by the intended users

So the lesson is simple: Data visualization needs to be shaped by the intended users, perhaps more so than the data. Knowing the key user groups who will

be working with your creations is essential to making them successful. Trying to visualize without user profiles is like trying to ice skate with blinders on – success will be purely accidental. So take the time to identify and understand all of the key audiences for a data graphic. Treat them with respect and the result will seem like magic. **11**

Based in New York, Bitsy Bentley is director of data visualization for GfK in North America. She can be reached at bitsy.bentley@gfk.com.



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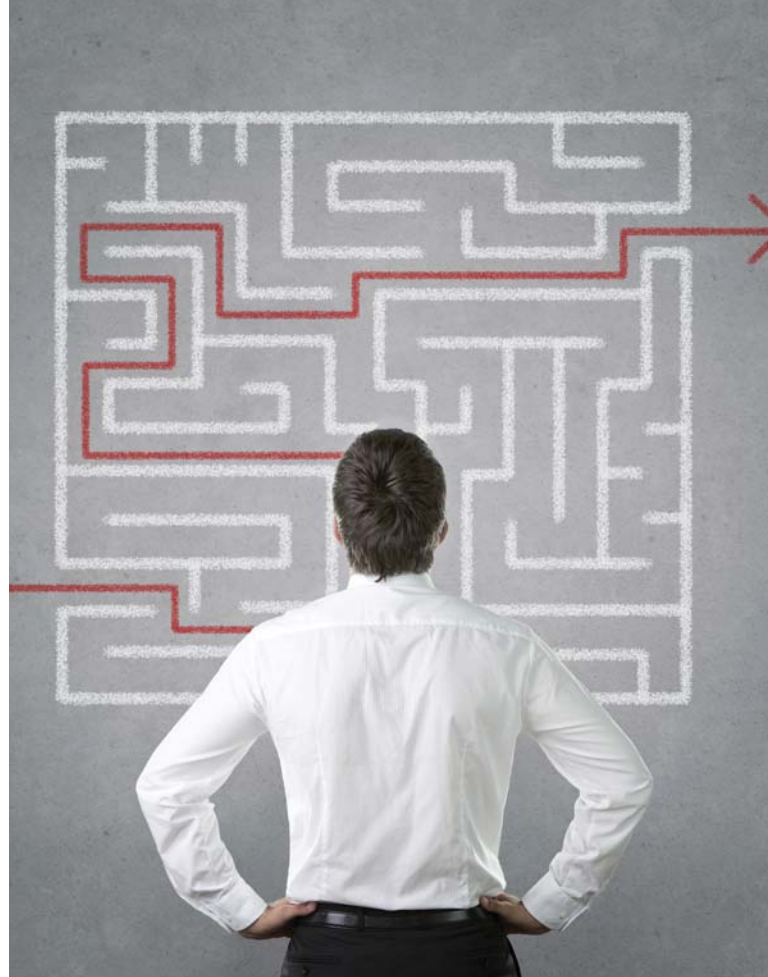
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Precisely wrong or generally accurate?

Musings on the value of metrics like last-click

| By Jim Kenyon



snapshot

Why direct sales attribution to a marketing channel is problematic and potentially dangerous to your bottom line.

For as long as businesses have been advertising, they have been asking “Is my advertising working?” John Wanamaker, the 19th century retailer, is credited with the oft-quoted quip: “Half the money I spend on advertising is wasted; the trouble is, I don’t know which half.” Fast-forward over 100 years and businesses are still looking for ways to understand whether their advertising efforts are working and, if so, which ones and in what combinations.

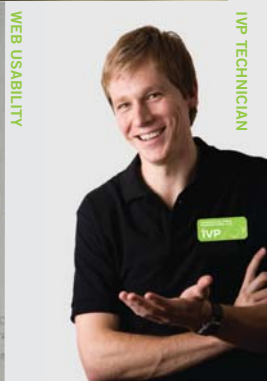
These are difficult questions to answer, primarily because it is hard to know what advertising has reached a given consumer, much less in what order. In an ideal world, a business would know what advertising, in what sequence, each consumer, transactor or not, has seen. With this data, one could try multiple techniques to suss out the contribution of each component. But the world of commerce is not ideal. A business does not know the entirety of ad exposure of potential customers.

Some businesses – notably those that operate primarily online – like to use last-click attribution for sorting out the utility of advertising efforts. Google, the hegemon of online advertising, even promotes last-click attribution in its Google Analytics platform. It sounds sexy, the tool looks high-tech and, heck, Google is suggesting it, so it must be good, right? Not so fast. Just because something is easy to do, has a high-tech-looking interface and comes from a market leader does not make it accurate. In fact, one should consider whether the tool promotes more AdWord spending or delivers useful results.

A nice Marketing Science Institute article, “Attribution modeling: understanding the influence of channels in the online purchase funnel,” by Hongshuang Li and P. K. Kannan, provides some insights into the issues with last-click attribution. Avinash Kaushik takes things a bit further in his blog post, “Multi-channel attribution modeling: the good, bad and ugly models.” Both of these articles should be on your must-read list if you are tasked with understanding “what marketing has done for you lately.” Using last-click or last-action attribution is a bit like giving the phone company full credit for a phone-based sale.



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Some useful terms to know

Last-click attribution: Assigning a sale to the click just before the checkout page; this generalizes to last activity attribution used for other media channels (e.g., coupons; direct TV; other specific, coded offers).

Type I error: Mistaking the clump of brush for a lion and running away, thus missing the opportunity to collect those tasty berries for your lunch.

Type II error: Mistaking the lion for a clump of brush and sticking around to be that lion's lunch.

Our firm has been working on return on marketing investment (ROMI) for nearly 10 years. We took a different approach than many by not focusing on just the readily available data from online channels and we did this for some pretty simple reasons: digital ad spending is still less than 25 percent of all ad spending; and advertising, in general, does not operate in a vacuum.

Not considering the effects of issues beyond your control, but still very real, and not considering "the other 75 percent" of your ad spending seemed like problems to us. Yes, it is difficult and tedious to include external factors or useful proxies for the same. Yes, it is difficult to aggregate spending across all advertising channels – those guys in accounting use complicated spreadsheets and databases. Yes, it is difficult to know precisely when a particular channel was active (i.e., in the field). No, the results are not precise to the last penny, but, yes, they are generally accurate. And that's the point. Would you rather your decisions be based on precisely wrong or generally accurate information? Would you rather your conclusions and actions be precisely wrong or generally accurate?

In today's metric-driven business climate, there is a desire to be as precise with measurements as possible, sometimes at the expense of relevance of said measurement. While a car's fuel gauge can predict velocity with extreme precision, it only is accurate in one instance: when it indicates that the tank is completely empty. The same can be true of Web site metrics. While the

number of visits to a particular page is relatively easy to measure, it doesn't always tell the whole story about how or why a person arrived at that page.

Last-click attribution risks committing a Type II error when the consumer does not continue to purchase from a particular page. Did she go to a physical outlet (Lands' End comes to mind) and make a purchase? Did she take out her smartphone and complete the transaction? Did she forward information via e-mail to her mother-in-law so "Grandma" would be able to pick up the Lego in question at Target? All these cases end up underestimating the value of said page. Beyond this, simple last-click attribution risks committing a Type I error by assigning purchases to this page that were really generated by other sources. Perhaps a TV or radio spot motivated the transaction and the page visited is just the one that the consumer managed to find (sorry, e-commerce developers – many of your sites are very difficult to navigate).

Further, marketers like to make a distinction between customer- and firm-initiated Web site activity. This seems specious as one has limited ability to understand what media an individual has encountered, particularly for non-online channels. Confounding this is online media encountered through different devices. Coalescing multiple (potentially shared) devices into one individual is problematic. Did I just save a link from an e-mail and dig it up as an entry point at some later date not because it was relevant but, instead, because it was handy? Did I ignore a firm-initiated link and go directly to the firm's site, appearing to be customer-initiated when, in fact, I was responding to a firm-initiated communication? Am I accessing the Web site from a friend's iPad? The possibilities boggle the mind.

Viable alternative

Fortunately, there is a viable alternative to last-click, last-action, path-sequence and other individual-level marketing effectiveness strategies. We sometimes refer to this option as "follow the money." In the end, what CEOs, CFOs, CMOs and decision makers of all stripes want to know is "How did our various marketing activities affect sales?" Sales are measured, conveniently, in units and dollars. Advertising

spending is measured, again conveniently, in units (of various types) and dollars. Finance folks, being who they are, like to track dollars and when they were spent or received.

Warning: Some complex data mining is condensed in the following paragraph to keep your eyes from bleeding – and to keep you from falling asleep. Not everyone appreciates the inner beauty of a multiple adaptive regression spline, neural network or support vector machine.

Given that marketing and sales activity can be measured in dollars and we can know when these dollars were spent or received, we can mine the data to find relationships, if they exist, between advertising and sales. We don't have to look for particular Web site path sequences, who clicked on what just before purchase or other myopic measures. As an added bonus, the results are in terms the C-suite understands: dollars. Not Omniture page clicks, DoubleClick click-through rates or other cryptic measures: just simple dollars.

To be fair, we don't know what caused Customer X to make a purchase.

We only know that TV spending, in conjunction with direct mail activity, resulted in higher sales and that billboards did not help sales at all, for example. But the mission was not to determine what motivated Customer X to purchase; it was to determine how the various marketing activities were contributing to sales. Can we predict, based on this data, what sales for next month will be if we increase TV and direct mail spending to the penny? No, certainly not. But we can predict ranges for sales given these spending levels that let you run your business. We can also understand the interactions between marketing activities – and whether these activities will make any difference if economic or other external factors change. Sometimes it is just as important to know when to “sit this one out” as it is to know when to “go all-in.” If the winter is going to be warm and dry it doesn't make much sense to spend your entire marketing budget trying to promote higher sales of extra-warm mittens. As an old fisherman once said, “Save your bait; the fish just aren't biting today.”

Velocity is slowing

Why do we give so much attention to Web sales? Is this where the majority, or even a large part, of commerce is conducted? According to census.gov retail sales data, e-commerce represents less than 6 percent of all retail spending in 2013, the strongest year, to date. Granted, there are some segments, like small consumer electronics, where e-commerce has taken hold. But this does not seem to generalize to all products, particularly not to large (in size or dollar value) items. Interestingly, the velocity of e-commerce sales is slowing over the 13 years of available e-commerce sales data. If it is going to make brick-and-mortar sales obsolete, it's going to take some time; perhaps enough time that some other distribution channel will come along first and e-commerce will end up like catalogue sales: another distribution channel that set out to conquer the world and ended up as a bit player in overall commerce. ①

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What are you getting at?

Applying behavioral economics to research physician decision-making

| By Mark Wheeler



snapshot

The author uses a pharmaceutical research example to examine the impact of different approaches to framing questions in research interviews.

Many of our clients, as well as the customers of our clients, are routinely called upon to make decisions under conditions of uncertainty. Oftentimes, these predictions are made fairly quickly and with only a limited amount of relevant information. Decision-making under uncertainty may be particularly relevant to health care (although it should apply to clients in any industry). Physicians frequently have to make choices about patient management on the basis of only brief discussions with patients whom they may have barely met. Further, their knowledge and understanding of the prescription drugs in their armamentarium is often incomplete or based upon possibly faulty knowledge or recollections. Figure 1 describes some of the common judgments that doctors routinely make in the process of seeing and treating their patients.

There is some evidence of a trend toward even faster – and more error-prone – physician decision-making. In a recent journal article (Michtalik et al, 2013), researchers surveyed over 500 internists and hospitalists. Overall, the physicians acknowledged that they have been increasingly taking on an increased patient load, leading to a reduced amount of time with each individual patient. They were also quite clear about the implications – many of them admitted that they now had less-than-optimal time to fully evaluate each patient and that their rate of medical errors has increased. Many of them claimed that their workloads have occasionally or often left them unable to discuss treatment options or answer patients' questions. Physicians also frequently admitted that they have ordered unnecessary tests or procedures because they didn't have enough time to assess patients in-person. As one might expect, their responses emphasized that there was an overall lessening of patient satisfaction.

The findings about physicians' increasing workloads are probably unsurprising, although still discouraging. There is a relatively new and highly-pertinent field that is directly applicable to the topic of quick decision-making. Behavioral economics (BE) is, among other



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Figure 1

Judgments about medicines are uncertain

- How much weight should I place on what the rep tells me about this medicine?
- How much weight should I place on what my colleagues told me about this medicine?
- How likely is this medicine to be effective?
- What is the likelihood of side effects?
- How well can I even remember what happened the last several times I prescribed this?

Judgments about patients are uncertain

- Will my patient take this medicine? Will my patient abuse the medicine?
- Will my patient fill the Rx or call back from the pharmacy and ask for something cheaper?
- How accurately is my patient describing his/her symptoms?
- How will my patient react if I ask additional, more personal questions?
- How can I quickly get this patient out of my office so I can see all of the other patients who are waiting?

Figure 2

The Field of BE Has Identified Lots of Heuristics, Shortcuts and Cognitive Errors That Drive Behavior

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|----------------------------|--|
| ▪ Anchoring and Adjustment | ▪ Preference Reversal |
| ▪ Availability Heuristic | ▪ Prospect Theory |
| ▪ Base Rate Fallacy | ▪ Regression to the Mean |
| ▪ Conjunction Fallacy | ▪ Representativeness Heuristic |
| ▪ Emotional Framing | ▪ Simulation Heuristic |
| ▪ Endowment Effect | ▪ Trusting Intuition over Algorithms |
| ▪ Framing Gains vs. Losses | ▪ WYSIATI (What You See Is All There Is) |
| ▪ Hindsight Bias | |
| ▪ Narrative Fallacy | |
| ▪ Overconfidence | |

things, the study of how we make decisions under conditions of uncertainty. Thought leaders in BE, particularly Nobel Laureate Daniel Kahneman (see his influential book *Thinking, Fast and Slow*) have documented dozens of heuristics, or shortcuts, that guide our choices, especially when we do not have the ability or time to carefully analyze all of the options. (A list of many, but not nearly all, of the shortcuts is provided in Figure 2.) The problem-solving strategies are reasonable to the extent that they often lead to good, or satisfactory, solutions. They are also economical, in the sense that a person can reach a conclusion with only minimal strain. These shortcuts are said to be driven

by a mode of thought called System 1, which works very quickly and requires little or no effort. By contrast, we use System 2 when we actively, effortfully and consciously think through a decision. The distinction between Systems 1 and 2 (summarized in Figure 3) is supported by many years of research from cognitive psychology.

As qualitative researchers and consultants, we are in a unique position to help our clients use BE principles. When we understand the ways that System 1 responds to situations of uncertainty, we can help our clients design better marketing research and also help them present their promotional data and arguments to physicians in

Figure 3

A Higher Caseload Translates to Greater Reliance on System 1

SYSTEM 1

- Fast/automatic/easy
- Performs familiar or practiced routines
- Fine for small talk
- Undemanding
- Can perform while tired, sick or stressed
- Impressions/intuitions/feelings
- Susceptible to errors

SYSTEM 2

- Slow/effortful/hard
- Necessary for novel decisions or routines
- Useful for harder questions
- Tiring/draining
- Impaired by fatigue, illness or stress
- Logic/analysis/reflection
- Can override errors through careful thought

to messages that were written to take advantage of decision-making shortcuts and heuristics. Although I cannot share the specific examples that I used (for reasons of client confidentiality), I have conducted some original research (i.e., some applied psychology experiments) to demonstrate the applicability of BE principles to marketing and marketing research, specifically concerning physician decision-making and prescribing.

Research respondents were 84 primary care physicians or PCPs. All were internists, family practitioners or general practitioners. They were screened to ensure that they were board-certified, that they see a minimum of 150 patients each month and that they have been in practice for two-to-25 years.

Respondents completed a brief Internet survey asking them to first consider hypothetical scenarios and then make decisions about what their attitudes or behaviors would be in those scenarios. Each scenario was presented to each physician in one of two ways. Although the two versions of each scenario were technically the same (e.g., the underlying decision was identical), the scenarios were worded differently – the differences in wording were designed to take advantage of System 1 heuristics or shortcuts. Examples of some of the relevant heuristics, and descriptions of each experiment, are below.

Serves as an anchor

When people are asked to estimate an answer, they are often strongly influenced by any possible answer given to them, even if the answer is not plausible. What typically happens,

Figure 4

Anchoring and Adjustment Question

Imagine that you have decided to prescribe an SSRI to a patient. The patient tells you that he is concerned about the side effect of nausea – he claims to have been told by one of his friends that **only around 3% of new SSRI patients** experience nausea when starting their medicine. He asks how likely it is that he will have nausea when he starts. What percentage likelihood do you tell him?

Alternate version: **about 90% of new SSRI patients**

The % likelihood of nausea that you would tell your patient when:

The patient's friend told him that **only around 3% of new SSRI patients** experience nausea when starting their medicine.

Average response: 12%

The patient's friend told him that **about 90% of new SSRI patients** experience nausea when starting their medicine.

Average response: 29%

$t(82) = 3.42, p < .0005$

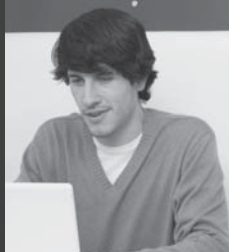
ways that build upon BE principles. In my own research, I have been able

to apply BE principles and have found that physicians respond more positively

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Figure 5

Framing Gains vs. Losses

Imagine that you are treating a teenage girl with acne. She is concerned about a big social event coming up in two weeks. There are two medicines that you are considering to treat the acne. They are both safe.

The Gain Frame

- If Medicine A is selected, one-third of her acne will be cleared in two weeks.
- If Medicine B is selected, there is a one-third probability that all of her acne will be cleared in two weeks, and a two-thirds probability that no acne will clear in two weeks.

71% picked this option

29% picked this option

The Loss or "Pain" Frame

- If Medicine A is selected, two-thirds of her acne will still be there in two weeks.
- If Medicine B is selected, there is a one-third probability that all of her acne will be cleared in two weeks and a two-thirds probability that no acne will clear in two weeks.

40% picked this option

60% picked this option

$\chi^2(1) = 9.5, p < .005$

Figure 6

Emotional Framing

Imagine that a new medicine has been indicated for patients with moderate or severe asthma. Clinical data show that the new drug leads to significant reductions in both daytime and nighttime symptoms, as well as improved FEV1 readings. The trials also showed some reports of serious exacerbations leading to ER visits in the first few weeks of product use.

- Positive frame: **95% of patients were not hospitalized** with exacerbations during the first month of therapy.
- Negative frame: **5% of patients were hospitalized** with exacerbations during the first month of therapy

On a 1-to-10 (low-to-high) scale, what is your level of enthusiasm for adopting the new medicine?

Positive frame: **Average rating of 6.5**

Negative frame: **Average rating of 4.7**

$t(82) = 3.6, p < .0005$

and what has been confirmed in dozens of published studies, is that the suggested answer serves as an anchor – people stay close to that number or opinion and make only a brief adjustment when coming up with their answer. Kahneman provided an example in *Thinking, Fast and Slow*. Visitors to the San Francisco Exploratorium were asked one of the following two questions:

- Is the height of the tallest redwood tree more or less than 1,200 feet?
- Is the height of the tallest redwood tree more or less than 180 feet?

Although the answers to these two questions (less and more, respectively) were quite easy, the key question came next. The visitors were then asked to estimate the height of the tallest redwood. People who had earlier been given the high anchor (1,200 feet) estimated an average height of 844 feet. Those initially given the low anchor estimated that the height of the tallest redwood was 282 feet. In each case, the (clearly incorrect) anchor played a massive role in people's estimates.

In the new research with PCPs, each physician read the scenario described in Figure 4. They imagined that a new SSRI (selective serotonin reuptake

inhibitor, like Paxil or Prozac) patient wants to know the percentage likelihood of nausea as a side effect of medication. (The true answer is probably somewhere between 15 percent and 25 percent, depending upon the brand and the dose.) Half of the physicians read that a patient's friend had told the patient that about 3 percent of new SSRI patients experience nausea. The other half of the physicians read a similar story, with an estimate of 90 percent, again from the friend.

Looking at Figure 4, it is clear that this unreliable anchor was highly influential – PCPs gave an average answer of 29 percent after hearing the higher anchor, compared to only 12 percent following the lower anchor. In fact, of the 42 physicians reading the lower anchor, 29 of them gave an estimate below 10 percent, compared to only four of 42 who read the higher anchor. The doctors were cognitively lazy – they used the percentages given to them by the unnamed friend to help produce their answers, even though this is one of the areas of their expertise. To generalize from this example, whenever patients (or colleagues or reps or marketing researchers) give potential answers to doctors, those answers have an exaggerated influence on the way that doctors will think and the way they will ultimately behave.

Arrive at different decisions

Another cognitive heuristic or shortcut that has been thoroughly documented within BE involves decision-framing, especially the framing of gains and losses. Simply put, when people think about the choices they should make, they frequently arrive at different decisions depending upon whether the focus is upon what they have to gain or what they have to lose.

Kahneman and his colleagues discovered that when we think about what we have to gain, we are risk-averse – overall, it is preferable to take a small gain rather than risk the small gain for the possibility of an even larger gain. The opportunity to gain something is highly pleasurable and even minor gains evoke pleasant feelings in most people. By contrast, when we think about what we might lose, we become risk-seeking. We hate to lose anything and will gamble on the possibility of

a big loss in order to avoid the pain of a small loss. In general, the fear of losing something (e.g., money, status, health) is emotionally intense and provokes strong negative feelings. This kind of emotional framing can be a powerful driver of behavior – we act, sometimes dramatically, to ensure that we don't suffer a loss.

Two experiments were conducted to demonstrate the physician decisions can be driven by the way that a choice is framed to them. The first (inspired by a classic experiment published by Tversky and Kahneman in 1981) asked doctors to imagine that they could treat a teenage girl with acne with either of two drugs, Medicine A or Medicine B. After reading the general scenario (described in Figure 5) physicians read about the two medicines in either a gain frame or loss frame and were then asked to choose their preferred medicine.

Their choices revealed a striking consistency with earlier findings from BE. When the doctors thought about gains (i.e., how much of the acne would be cleared), 71 percent selected the safer option – Medicine A. By contrast, when they dwelled about the loss or “pain” of having acne, only 40 percent went with Medicine A, even though the two frames clearly describe identical choices.

Emotional power

In a demonstration of the aversive emotional power of negative frames, the physicians were also asked to read a brief hypothetical scenario about a new medicine for asthma (Figure 6). The new drug was described as effective but also sometimes accompanied by

Figure 7

Examples of Preferred and Non-Preferred Statements from Recent Messaging Research

NOT GOOD!



▪ Use of Product X resulted in a 36% success rate compared to 32% for the standard treatment alone

GOOD!



▪ Use of Product X resulted in a 4% higher success rate compared to the standard treatment alone

GOOD!



▪ Product X was found to be highly palatable in pivotal trials, with 70% of patients describing the taste as “excellent” or “good”

GOOD!



▪ Product X was found to be highly palatable in pivotal trials, with only 30% of patients describing the taste as “poor” or “bad”

NOT GOOD!

Figure 8

Pharmaceutical Reps Can Use Anchors to Promote Their Product or to Knock the Competition

Anchor your own product

GOOD ANCHOR: Doctor, when you have prescribed our drug in the past, would you say 95% of your patients have been satisfied with the drug? What percentage do you think have been satisfied?

NO ANCHOR: Doctor, how satisfied have your patients been with our drug?



Anchor the competitor

GOOD ANCHOR: When you have prescribed [*the competing drug*] in the past, would you say that your patients have ultimately called back for a different prescription as often as 75% of the time? How often do they call back for a change?

NO ANCHOR: Doctor, how often have patients called back to change their prescriptions from [*the competing drug*] to something else?

the serious side effect of exacerbations (e.g., shortness of breath, wheezing, chest tightness). Half of the doctors

learned about the clinical data via a positive frame – they read about the large majority of patients who used the



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medicine without exacerbations. Other doctors read the negative, or loss frame, which mentioned the small percentage hospitalized with exacerbations.

Once again, results showed that physicians are highly susceptible to framing effects, even in their own areas of expertise. When asked to rate their levels of enthusiasm for using the new medicine, they were significantly more optimistic when the information had been presented in the positive frame. The effect held even though it would have been trivially easy to convert the positive frame into a negative one (e.g., to reason that 95 percent who were not hospitalized translates to 5 percent who were hospitalized). The act of reading and thinking about the small percentage of asthma exacerbations in the loss frame was concerning and possibly frightening to them – significantly more than thinking about the majority of patients who avoided the hospital. The way that the data was presented to them drove the drug’s appeal, or lack of appeal.

Heavily susceptible

As demonstrated in these three quick experiments, physicians are susceptible to the kinds of mental shortcuts that characterize System 1 thinking. These effects were readily apparent in domains where the physicians have plenty of experience. While none of the decisions that they made were technically wrong or irrational, they were

heavily susceptible to variations in the wording of the questions.

As researchers and consultants, we can incorporate BE into our armamentarium of skills in a number of ways. First, there are many situations in which we should actively ensure that System 1 biases are not unduly influencing our findings. The first, and perhaps most obvious, place is in our conversations with research respondents. The questions that we pose in our interviews are prime areas where we many unintentionally anchor our respondents towards implausible or exaggerated answers. Those of us working in the pharmaceutical space are highly familiar with the kinds of side-effect and adverse-event data that routinely accompany new medicines. While participating in clinical trials, patients are often asked to answer multiple questions about side effects such as, “Did the drug give you nausea?” Simply considering such a question typically stimulates a non-trivial percentage of patients to report that they have the symptom. Lest you believe that that the symptom may be a real effect of the investigational drug, it is helpful to know that patients in the placebo groups frequently report these symptoms at a comparable rate, even when the symptom (say, dizziness) is not a highly plausible result of taking the medicine.

Through experience, physicians

have learned to shrug off these kinds of results from clinical trials but they are still vulnerable to anchoring and suggestibility in marketing research interviews. Of course, we all know not to ask leading questions but research in BE and cognitive psychology tells us that even the gentlest hints of a nudge, or anchor, can affect the answers we receive. Consider even fairly mundane question, “How much do you like this product?” or “How well did that work for you?” Even the word “like” should positively anchor the responses here – a safer probe might be “To what extent do you like, or dislike, this product?” Learnings from BE make clear that it is worth taking a second, and third, look at our discussion guides to eliminate words and phrases that anchor our respondents toward an attitude or answer.

An even more compelling – and perhaps more controversial – application of BE comes when we intentionally create scenarios for our customers to take advantage of System 1 principles. Differently put, we want our end customers to think and act favorably towards our product and, by implication, to think and act relatively less favorably towards competitors. BE shows us how to get there.

In recent months, I have conducted research with clients to determine the strongest promotional messages for a new drug. During the consulting and planning phases of the research, we worked together to identify some promotional claims that could demonstrate the power of framing. (Part of my motivation here was to help the client and another part was to demonstrate the utility of BE in marketing research to the client – and also to boost the perception of my own value.) We came up with some product attributes that could be described in terms of comparisons, gains or losses. Two examples are shown in Figure 7. (For reasons of confidentiality, the product’s name and treatment area have been removed from the examples.)

Throughout the research, physicians rated and discussed the merits of a number of different supporting claims. Two of the efficacy claims (which were neither viewed concurrently nor consecutively) are shown in the top half of the figure. The latter of the two

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statements described a small but significant gain in efficacy attributable to the new drug (as a reminder, people are happy to accept even small gains and are averse to risking or losing them). The first statement also accurately described the data but without the reference to any gains in efficacy. The latter statement was overwhelmingly preferred by physicians as more impressive even though, side by side, it is difficult to rationally argue that there is any meaningful difference between the two statements. In fact, there isn't any underlying difference since the sentences described the identical data comparison. It was the framing that drove their preferences.


Similarly, in the lower comparison, the taste of the new drug is described in two different ways. All physicians in research were told that each patient in the clinical trials had rated the taste as excellent, good, poor or bad. The first statement represents the results in the positive frame, with the latter statement representing the negative frame. While it should have been easy for physicians to translate each statement into

the other statement through simple subtraction, the positively-framed sentence was considerably more impactful. Even the simple reference to "poor" or "bad" findings lead doctors to have a negative or cautious opinion about the medicine's taste and appeal.

We can also help our clients apply anchoring to promotion. One promising avenue in the pharmaceutical arena comes via the rep detail. Although the content of a drug rep's sales message is tightly regulated by the FDA, it is still possible for reps to use BE to boost the appeal of their product. A couple of examples are in Figure 8. In the top half of the figure is a script that can set an impressive anchor for a product (i.e., the doctor's perceived percentage of satisfied patients will be anchored up in the direction of 95 percent). It is similarly possible, albeit less friendly, to establish a negative anchor for the competition (as in the bottom half of the figure).

Powerful and flexible tool

Ultimately, BE can be an enormously powerful and flexible tool in our

toolboxes; the examples described in this article barely scratch the surface. Researchers and consultants should dive into the BE literature, especially *Thinking, Fast and Slow*, to discover additional mental heuristics and shortcuts that drive decision-making and behaviors. By aligning our research and outputs with the thought processes of our end consumers, we can deliver additional value to our clients. 

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Names of Note

In Memoriam...

■ **Bob Barocci**, former president and CEO of the Advertising Research Foundation, died on March 27 at age 72.

■ Resolution Research, Denver, has hired **Abby Drwecki** as research associate and project manager.

■ ThinkNow Research, Burbank, Calif., has hired **Carlos Yañez** to lead its custom research division.



Yañez

■ London research company Purdie Pascoe has hired **Muhammad Asim** as senior vice president and **Josina Habegger** as associate director. Both will be based in the company's new Chicago office.

■ New York research company OnePoint Global has promoted **Ruth Davies** to marketing director and hired **Shelley Robertson** as director, product marketing. Both will be based at the company's office in High Wycombe, U.K.

■ **John Nathenson** has joined San Francisco research company AnswerLab as senior vice president, client solutions and marketing.

Nathenson will be based in New York. Additionally, **Pamela Walshe** has been promoted to vice president, people and client experience, and **Danaus Chang** has been promoted to vice president, strategic alliances. Chang will also be based in New York.

■ New York research company Hall & Partners has made three appointments to its London team: **Abigail Stuart** as global CEO, Hall & Partners Health; **Estelle Shepherd** as global head of people; and **Ailean Mills** as head of cultural investigation.



Stuart



Shepherd

■ Brain Surgery Worldwide Inc., an Atlanta research company, has promoted **Heather Rupp** to vice president.

■ Centris Marketing Science, a Horsham, Pa., research company, has named **Marc Ruschmann** vice president, modeling and analytics.

■ Stamford, Conn., research company InsightExpress has hired **Jim Forrest** as senior vice president, ad measurement solutions.



Forrest

■ **Joel Rubinson** has joined New York research company Converseon's advisory board and will act as a project strategist to key clients.

■ MSS, a Scottsdale, Ariz., research company, has hired **Kim**

Denny as director, research and analytics, and **Damion Valencia** as research analyst.

■ **Ilene Lanin-Kettering** has been named vice president, strategic design and analysis, at Quester, a Windsor Heights, Iowa, research company. She will be based in Chicago.

■ Brädo Creative Insight, a St. Louis research company, has hired **Jonathan Bloom** as creative strategist.



Bloom

■ **Marcus Turner** has joined Toronto research company Logit Group as vice president, U.S. Turner will be based in Portland, Ore.

■ **Chris Clarke** has been named CMO at Shelton, Conn., research company SSI. Additionally, **Ashlin Quirk**, SSI's general counsel and secretary, has been appointed to the company's leadership team.



Clarke

■ Encino, Calif., research company uSamp has promoted **Ted Bouzakis** to executive vice president, sales, and hired **Elisabeth Mischel** as vice president, Instant.ly.



Quirk

■ **Elizabeth Teehan** has been named COO of New York research company Abt SRBI.

■ **Sherri Neuwirth** has joined Cambiar LLC, a Phoenix management



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consulting firm focusing on the research industry, as associate.

■ **Walker Information**, an Indianapolis customer intelligence consulting firm, has promoted **Melissa Meier** to vice president, strategic account manager, and **Lauri Jones** to vice president, consulting services.

■ Los Angeles research company **Interpret LLC** has hired **Charles Voss** to its client service team in New York.

■ **Harpeth Marketing**, a Franklin, Tenn., marketing firm providing consulting and outsourced marketing services in the market research industry, has hired **Kathryn Currey** as marketing manager.



Currey

■ **Greenberg Strategy**, an Emeryville, Calif., research consultancy, has

hired **Nicola Finnerty** as head of qualitative research.

■ New York researcher **The Nielsen Company** has named **Greg Daniel** chief digital marketing officer; **Laura Nelson** chief communications officer; **Saul Rosenberg** chief content officer; and **Marcy Shinder** chief marketing officer.

■ **Dianne Thompson** of **Camelot Group** has been named president of the **Market Research Society**, London.

■ **Sarang Panchal** has been appointed CEO of **MRSS India**, a Mumbai, India, research company.

■ London research company **YouGov** has appointed **Bianca Bruhn** as CEO of its Nordic business, based in Copenhagen, Denmark.

■ Hampshire, U.K., research company **Marketing Sciences** has appointed **Debbie Parker** as associate director, sensory testing.

■ London research company **TNS** has named **Yong Joo Park** chief research officer for Asia-Pacific. He will be based in Singapore.

■ **BrainJuicer Group PLC**, London, has named **Jeff McDonald** vice president, North America. McDonald will oversee BrainJuicer's Southeast account team.

■ **Hard Rock International** has promoted **Nora Swire** to senior director of marketing. Marketing research will be among her responsibilities.

■ **SurveyHealthCare**, New York, has hired **Ashley Bowden** as vice president, business development.

■ Austin research company **Illuminas** has made two appointments at its New York office: **Steven Maskell** as senior vice president and **Jocelyn Jackson** and research manager.

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Research Industry News

News notes

■ **The Media Rating Council (MRC)**, New York, has lifted the viewable impression advisory it issued in November 2012, which advised the marketplace to refrain from transacting on viewable impressions as a digital advertising currency metric until certain issues related to the measurement of viewable impressions could be resolved.

The advisory was a result of the MRC's findings from an industry-wide pilot project that revealed significant measurement issues standing in the way of a seamless transition from a digital advertising currency based on served impressions to one based on viewable impressions.

Since that time, MRC and other parties have worked to identify and remove these obstacles. For video advertising, MRC advises the marketplace to observe an additional gating period prior to transacting on viewable video impressions. This gating period will expire on June 30, 2014.

Acquisitions/transactions

■ Stockholm, Sweden, digital music service **Spotify** has acquired Somerville, Mass., music intelligence company **The Echo Nest**. The Echo Nest will continue to operate out of its Somerville and San Francisco offices.

■ Cincinnati research company **RDI**

Corporation has acquired **SIRS Inc.**, a Fort Mitchell, Ky., research company. RDI will assume all of the technology assets, clients and retain all of the current employees of SIRS Inc.

■ Van Nuys, Calif., research company **SoapBoxSample** has acquired Bloomington, Minn., research company **ClickIQ's** e/visor panel of 350,000+ members across the U.S. and Canada.

■ Rotterdam, Netherlands, research company **MetrixLab** has acquired a majority stake in **Oxyme**, an Amsterdam social media analytics company.

■ Plano, Texas, research company **Sentry Marketing Group** has acquired **Feedback Plus**, a Dallas research company. The combined group will be led by David Agius at Sentry's new Plano offices at 2222 W. Spring Creek Parkway, No. 114.

■ London research company **Salience Insight** has acquired the U.S. operations of Washington, D.C., research company **CARMA International**. The two companies will operate side-by-side.

■ Oslo, Norway, research software company **Confermit** has acquired Oslo social intelligence and text analytics company **Integrasco**.

Alliances/strategic partnerships

■ Montreal research companies **Suntaeg Technologies** and **Semeon Analytics Inc.** have formed a strategic partnership to merge Suntaeg's data management and data integration solution with Semeon's social media platform.

■ Portland, Ore., research company **Rentrak Corp.** has partnered with data management company **i360** to provide insights into political audiences by integrating i8 segments of voter data with Rentrak's local television viewing ratings.

■ Encino, Calif., research company **uSamp** and **WorkFusion**, a New York crowd computing software company, have integrated uSamp's audience into WorkFusion's platform to build a network of online talent.

■ Westlake Village, Calif., research company **J.D. Power** has formed an alliance with **DealerRater**, a Waltham, Mass., automotive dealership consumer review service, to integrate DealerRater's customer ratings and reviews of car dealerships with J.D. Power's customer satisfaction insights via J.D. Power's customer experience management platform.

■ Nuremberg, Germany, research company **The GfK Group** has merged **PT Primera Indonesia**, a Jakarta, Indonesia, research company, into GfK's existing retail tracking and media business.

■ Chicago retail experience company **The Carlson Group** has partnered with New York research company **GfK** and Schiller Park, Ill., retail design and branding firm **RGLA**, incorporating GfK and RGLA's insights to improve Carlson's retail solutions.

■ Port Washington, N.Y., research company **The NPd Group Inc.** has signed a market information services agreement with New York researcher **The Nielsen Company** for school and office supplies retail market data and analytic services. As part of the agreement, Nielsen will serve as NPd's preferred analytics provider for school and office supplies clients.

Separately, Nielsen and Yangon, Myanmar, research company **Myanmar Marketing Research and Development Co.** have entered into a joint venture, dubbed Nielsen MMRD, to combine their solutions to help companies established in Myanmar or that have plans to enter the market to understand the market and consumer dynamics.

Finally, Harleysville, Pa., consulting



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firm the **Natural Marketing Institute** (NMI) and Nielsen have collaborated to overlay Nielsen's Homescan panelists on four NMI consumer segmentation models: health and wellness; sustainability (LOHAS); organic; and healthy aging.

■ Research companies **Ipsos MediaCT**, New York, and **mTAB**, Yorba Linda, Calif., have partnered to make the Ipsos Affluent Survey USA available to brand marketers on mTAB's platform.

Awards/rankings

■ **The Advertising Research Foundation**, New York, held a ceremony for its 2014 Great Minds Awards in March in New York. **William A. Cook** received the Lifetime Achievement Award; **Gian Fulgoni** the Outstanding Board of Directors Lifetime Achievement Award; Decipher Inc.'s **Kristin Luck** the Future-Forward Award (Gold); Electronic Arts' **Jack Koch** the Innovation Award (Gold); and TNS Global's **Prerit Souda** the Rising Star Award (Gold). For a full list of winners visit <http://thearf.org/great-mind-14.php>.

■ **Point of Purchase Advertising International**, Chicago, announced the winners of its annual Outstanding Marketing at Retail Achievement Awards on March 19 in Las Vegas, including the Display of the Year Award, Budget Award, Creative Award and Choice Award. For a list of winners visit www.popai.com.

■ Reston, Va., research company **comScore Inc.**'s Digital Analytix Multi-Platform product was named the 2014 New Technology of the Year by the **Digital Analytics Association**, New York.

New accounts/projects

■ **ESOMAR**, Amsterdam, has selected research companies **Decipher Inc.**, Fresno, Calif., and **Global Market Insite** (GMI), Bellevue, Wash., as its cross-platform survey providers. ESOMAR's surveys will be powered by Decipher's Beacon survey and reporting software solution. GMI will provide local creative survey design and programming support.

■ U.K. shopping centers **Meadowhall**

and **intu** have each selected **eDigitalResearch**, Hampshire, U.K., to gather in-the-moment voice-of-the-customer feedback.

■ **The American Hospital Association**, Chicago, has expanded its endorsement of Minneapolis research company **Avatar Solutions** to include Avatar's full suite of health care survey tools, including employee engagement, exit, new hire, physician, patient experience/satisfaction and culture of safety.

■ Shelton, Conn., research company **SSI** has partnered with **Spirit Airlines**, Miramar, Fla., allowing members of the airline's loyalty rewards program Free Spirit to join Miles for Thoughts, a business research panel from SSI. Miles for Thoughts panel members can earn Free Spirit miles for sharing their opinions.

■ Cheshunt, U.K., retailer **Tesco** has selected Chicago research company **Information Resources Inc.** as its market tracking provider for its U.K. business.

■ Rotterdam, Netherlands, research company **MetrixLab** has formed a new division called **MetrixLab Big Data Analytics**.

■ Baltimore video advertising platform **Videology** has selected TV data from New York researcher **The Nielsen Company** for cross-screen planning, buying and measurement across linear television and online video.

■ **Network Research**, London, has adopted the Beacon market research and reporting platform from **Decrypt**, the London branch of Fresno, Calif., research company Decipher Inc., for its online customer experience research.

■ **GlobalWebIndex**, an ongoing study of the digital consumer, has selected Encino, Calif., research company **uSamp** to power its syndicated tracking service, surveying a minimum of 170,000 internet users a year.

New companies/new divisions/relocations/expansions

■ London research company **Purdie Pascoe** has expanded into the U.S. by

opening an office in Chicago.

■ Wilton, Conn., research company **Toluna** has opened an office in Seoul, South Korea. Kayne Park has been appointed country director, Korea, and will lead the operation.

■ **Sands Research Inc.**, El Paso, Texas, and **Neurons Inc ApS**, a Copenhagen, Denmark, research company, have merged. The new entity, called **Neurons Inc.**, will be headquartered in the U.S.

■ Matt Dusig and Gregg Lavin have launched **Innovate MR**, a Los Angeles research company. The company is online at www.innovatemr.com.

■ Nuremberg, Germany, research company **The GfK Group** has rebranded GfK International GmbH as **GfK Entertainment**. The new entity is online at www.gfk-entertainment.com.

■ **MSS**, a Scottsdale, Ariz., research company, has opened a London office. Susan Luebke, director, global research and analytics, will manage the operation.

■ Matt Prados has founded **Message Metrics**, a Ladera Ranch, Calif., research company. The company is online at www.messagemetric.com.

Research company earnings/financial news

■ **MetrixLab**, Rotterdam, the Netherlands, announced a 22 percent increase in revenue, to \$67 million, in 2013.

■ **Confermit**, Oslo, Norway, achieved double-digit organic revenue growth in 2013.

■ **The GfK Group**, Nuremberg, Germany, announced financial results for 2013. Adjusted operating income grew by 1.6 percent to €190.4 million. Organic sales growth amounted to 0.8 percent. At €1,494.8 million, sales were slightly below 2012 (€1,514.7 million) due to currency effects.

■ Sarang Panchal, CEO at **MRSS India**, a Mumbai, India, research company, has acquired a significant equity stake in MRSS India.

CALENDAR OF EVENTS

●●● can't-miss activities

The Pharmaceutical Business Intelligence and Research Group will hold its annual general meeting on **May 18-21** at the Atlanta Hilton in **Atlanta**. Visit www.pbirg.com.

IIR will hold its Future of Consumer Intelligence conference on **May 19-21** at the Sheraton Universal in **Universal City, Calif.** Visit www.iirusa.com/technology/homepage.xml.

featured

Quirk's will hold **Cocktails With Quirk's**, a free networking event for MR professionals, on **May 19** at the Karl Strauss Brewing Company **Universal CityWalk** from 8-11 p.m. PDT. This event will be held in conjunction with IIR's Future of Consumer Intelligence conference. The party is free to attend and open to all Quirk's subscribers but space is limited, so register in advance at http://linktrack.info/cocktails_la.

Worldwide Business Research will hold its conference, "eTail Latin America," on **May 19-21** at the Eden Roc Renaissance in **Miami Beach, Fla.** Visit www.wbresearch.com/etaillatinamerica/home.aspx.

The Mystery Shopping Providers Association will hold its annual Europe conference on **May 27-29** at the Divani Apollon Hotel in

Athens, Greece. Visit www.mspa-eu.org/en/Upcoming_annual_conference.html.

The Merlien Institute will hold a conference, themed "Market Research in the Mobile World North America," on **May 27-30** in **Chicago**. Visit www.mrmw.net/north-america.

The Council of American Survey Research Organizations will hold its annual technology innovation event on **May 28-29** in **Chicago**. Visit www.casro.org.

The Marketing Research Association will hold its Insights and Strategies Conference on **June 4-6** in **Chicago**. Visit www.marketingresearch.org/conferences.

The Marketing Research and Intelligence Association will hold its annual conference, themed "Dig Deep and Discover," on **June 8-10** in **Saskatoon, Saskatchewan**. Visit <http://mria-arim.ca/news/mria-news/mria-conference-2014>.

The International Quality and Productivity Center will hold a conference, themed "Shared Services Exchange and Outsourcing," on **June 15-17** in **Greensboro, Ga.** Visit www.sharedservicesexchange.com.

The American Marketing Association will hold its annual advanced research techniques forum on **June 22-25** at the Eldorado Hotel in **Santa Fe, N.M.** Visit www.marketingpower.org.

The International Quality and Productivity Center will hold its Market Research Exchange conference on **June 22-24** in **Texas**. Visit www.marketresearch-exchange.com.

Worldwide Business Research will hold its conference, "eTail Europe," on **June 23-25** at the Queen Elizabeth II Conference Centre in **London**. Visit <http://etaileurope.wbresearch.com>.

The European Pharmaceutical Market Research Association will hold its annual conference, themed "Embracing Change, Cultivating Opportunity," on **June 24-26** in **Brussels, Belgium**. Visit www.ephmra.org/event/2014-conference.

IIR will hold a conference, themed "Shopper Insights in Action," on **July 14-16** at Navy Pier in **Chicago**. Visit www.shopperinsightseven.com.

The Environmental Systems Research Institute will hold a user conference on **July 14-18** at the **San Diego Convention Center**. Visit www.esri.com.

The International Quality and Productivity Center will hold its annual CMO Exchange Latin America conference on **July 16-19** in **Miami**. Visit www.cmoexchange latinamerica.com.

The International Quality and Productivity Center will hold its annual customer analytics and intelligence conference, themed "Leveraging Analytics for Customer and Business Value Creation," on **July 28-30** in **San Francisco**. Visit www.customeranalyticsevent.com.

Worldwide Business Research will hold its flagship conference, "eTail East," on **August 11-14** at the **Philadelphia Marriott Downtown**. Visit www.etaileast.com.

The Marketing Research Association, Quirk's and the Market Research Executive Board will host the Corporate Researchers Conference on **September 17-19** in **Chicago**. Visit <http://crc.marketingresearch.org/index.cfm>.

The Merlien Institute will hold a conference, themed "Market Research in the Mobile World Europe," on **September 23-26** in **Berlin**. Visit www.mrmw.net/europe.

The Council of American Survey Research Organizations will hold its annual conference on **September 29-October 2** in **Denver**. Visit www.casro.org.

Worldwide Business Research will hold a conference, themed "Luxury Interactive," on **October 1** in **New York**. Visit www.luxuryint.com.

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



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Cocktails with Quirk's
Monday, May 19th
8:00 - 11:00



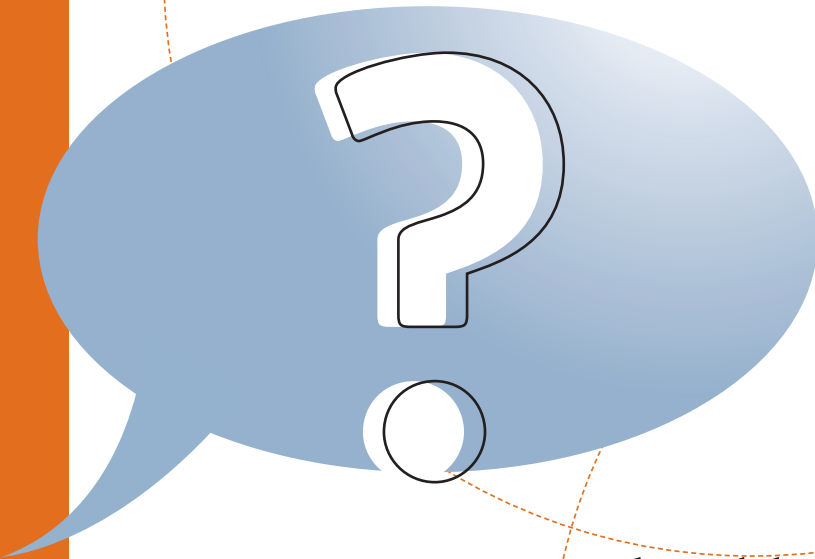
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Questions you should ask when selecting a moderator

After the project is completed, what are your deliverables?

Most qualitative researchers offer a variety of reporting approaches ranging from written report (toplines, executive summaries, full reports, etc.) to in-person presentations. The type of reporting will vary depending on your needs and pricing considerations. At the end of the project your organization should have learned more about how your customers feel in a way that aligns your marketing efforts with the needs of your customers.

Can you help me determine where should we hold our focus groups?

A skilled qualitative researcher should be able to help you choose which market or markets to visit. Obviously, you should interview people in the markets where you have customers. If you are in many markets, you should pick representative markets, but also consider a good spread by geography and size of market. As the economy grows ever more global, regional differences in many product categories

have been evaporating. However, with some categories regionality is still important.

What is your philosophy of moderating?

The answer should be in line with the client's general approach to marketing research and also align with the client's corporate culture and with the type of product or service being researched. For example, if the client firm is a staid, no-nonsense company, its in-house researchers may not be comfortable with a moderator who uses a variety of exploratory projective techniques.

Here are my project objectives - what would be the best qualitative approach to accomplish them?

Keep an open mind as to which is the best methodology: online or offline, focus groups or in-depth interviews, ethnography or in a facility. Think about your customers - how they can be reached best and how well would they respond to each methodology? A strong qualitative researcher should be able to consult with you and help you identify the best methodologies for your project.

Special thanks to the Qualitative Research Consultants Association and Judy Langer, president of New York-based Langer Qualitative, for providing input on the questions and responses.



quirks.com/articles ID 20080517

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2014

Focus Group Moderator Directory

Following is a list of over 240 moderators at 138 firms. These firms have paid to be included in the magazine version of the directory. The directory has three sections. The first section lists all the firms alphabetically and includes their contact information along with the names of the moderators they have on staff. The second section cross-references firms by the industries and markets they specialize in and the third section is a personnel cross-reference of the moderators. For your convenience, this directory is also available at www.quirks.com. (The online version lists 1,000 moderators at nearly 900 firms.)

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Personnel Cross-Reference	p. 101



A searchable version of
this directory is available
at www.quirks.com



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Established 1996. Hispanic qualitative consumer research and ethnography. Bilingual and bicultural, we moderate in Spanish or English. Beatriz - a psychologist. Guy - a seasoned marketing, advertising and research professional. Both have extensive experience working in the U.S., Caribbean, Mexico, Central and South America and Spain. Our combined areas of expertise and option of female or male moderators enable us to better uncover consumer insights and provide value-added recommendations and can offer clients the benefit of consistency in analysis, as well as both cost and time efficiencies when conducting projects among Hispanic and general-market target audiences.



Frieden Qualitative Services

Frieden Qualitative Services
Sherman Oaks, CA
Ph. 818-789-6894
garytheg@aol.com
www.garyfrieden.com
Gary Frieden, Ph.D. 15000+ sessions since 1984

Experience insightful focus groups (in-person as well as online Webcam) from a style I've developed over 20 years! With a Ph.D. in psychology, I uncover underlying motivational reactions and "get the 'real' stuff." Respondents and clients enjoy my high-energy sessions, creating involvement. Specialties: packaged goods, advertising, new concept development, positioning. Seniors are a strong specialty! Medical, general consumers, Web sites, banking, wireless, automotive, beverages, fast food, customer service and more. I've been the invited speaker at many qualitative conferences. QRCA and MRA member and certified PRC, presenting my unique approach to focus group moderating. Benefit from our collaboration! Contact Gary Frieden.

GKS Consulting LLC

Evanston, IL
Ph. 847-571-3445
gail@gksconsulting.net
www.gksconsulting.com
Gail Straus 550 sessions since 1995

GKS Consulting offers specialized market research serving nonprofit institutions and other service-providing organizations. With more than 30 years of institution- and agency-based experience, we work closely with clients to understand objectives, challenges and opportunities and then listen carefully to find the insight and perspective that takes strategy to the next level. As one client says: Gail brings a keen, rational research process paired with extensive marketing experience. Her moderation skills are exceptional whether group or one-on-one.

Great Questions, LLC
 St. Louis, MO
 Ph. 636-399-7746
 Krista@GreatQuestionsCompany.com
 www.GreatQuestionsCompany.com
Krista Knuffman 750 sessions since 1995

Great research begins with Great Questions! We help you discover the answers you need to move forward with confidence. Everything we do involves discovery through people - what they think, how they feel, what they want, what they do and their ideas. We manage your entire project, from exploring your research needs to reporting the results and helping you use those results to grow your business.

GTR Consulting
 San Rafael, CA
 Ph. 415-713-7852
 gary@gtrconsulting.com
 www.gtrconsulting.com
Gary Rudman 1000+ sessions since 1991

For over 20 years, Gary Rudman of GTR Consulting has specialized in custom qualitative market research among kids, teens, gatekeeper parents and young adults (ages 21-35). We also offer our gTrend macro-trend syndicated studies on teens and young adults.

Hannah & Associates, Inc.
 Blue Hill, ME
 Ph. 207-374-3550 or 207-266-6037
 margaretbhannah@gmail.com
 www.hannahassociatesinc.com
Maggie Hannah 6200+ sessions since 1975

Forty years of offering professional and customized qualitative research conducted with teens, Boomers, Gen-Xers, seniors, medical and financial professionals, etc. A value-added partner providing powerful insights for all your qualitative needs!

Hardwick Research
 Mercer Island, WA
 Ph. 206-232-9400
 nancy@hardwickresearch.com
 www.hardwickresearch.com
Nancy Hardwick 800+ sessions since 1990

Nancy is an experienced moderator, skilled listener and effective communicator. She incorporates both qualitative and quantitative techniques to uncover growing consumer trends, define target markets and provide insight into marketing challenges.

Hartt and Mind Market Research
 West Hartford, CT
 Ph. 860-236-1499
 Jenifer@HarttandMind.com
 www.HarttAndMind.com
Jenifer (Simson) Hartt 1000+ sessions since 2001

Sensitive issue? Challenging project? Bring it on! We uncover actionable insights from physicians, patients, C-suite, entrepreneurs and consumers. Our qualitative methods include in-person focus groups and IDIs, telephone depth interviews and online bulletin boards. Jen is a managing editor of the Qualitative Toolbox section of QRCA's award-winning Views magazine.

Hispanic Focus Unlimited
 Pharr, TX
 Ph. 956-501-4211 or 956-783-9907
 hispanicfocus@aol.com
 www.hispanicfocusunlimited.com
Ruben Cuéllar 2500+ sessions since 1995
Kat Figatner 300+ sessions since 2005

As the owner of a focus group facility I have conducted thousands of focus groups and IDIs over my 28 years of experience in market research. I am a bilingual/ bicultural moderator with experience in a wide range of categories and markets, specializing in Hispanic consumers of all ages in the U.S.

Hispanic Identity - Identidad Hispana
 Recruitment and Research Services
 Pasadena, CA
 Ph. 818-241-9164 or 323-841-9497 (mobile)
 info@hispanicidentity.com
 www.hispanicidentity.com
Liliana Caceres 1000+ sessions since 2000

Hispanic Marketing Insights, LLC
 Liberty Township, OH
 Ph. 513-777-0289
 rhernandez@hispanicinsights.com
 www.hispanicinsights.com
Rafael Hernandez 1400+ sessions since 1996

Rafael brings more than 20 years of corporate and marketing experience to his practice. Trained at the Burke Institute, experience includes: IDIs, triads, in-home studies, focus groups, shop-alongs, B2B. Rafael's knowledge of the Hispanic consumer and his being fully bilingual and in tune with the culture allow him to understand clients' needs and maximize the effectiveness and value of research studies.

Hispanic Perceptions - Consumer Insights Research
 A DBA of Caroline Promotions Inc., a Certified Women and Minority Co.
 Glendale, CA
 Ph. 310-428-7970 or 323-841-9497 (cell)
 liliana@hispanicperceptions.com
 www.hispanicperceptions.com
Liliana Caceres 1000+ sessions since 2000

Hispanic Research Inc.
 East Brunswick, NJ
 Ph. 888-722-6773 or 732-613-0060
 info@hispanicresearch.com
 www.hispanicresearch.com
Ricardo A. Lopez 2000+ sessions since 1986
Otto J. Rodriguez 1500+ sessions since 1999

Hispanic Research Inc. is a marketing consulting firm that specializes in the U.S. Hispanic market. It provides consulting services to businesses that intend to market their products and/or services to the U.S. Latino community. The company specializes in providing actionable research information and marketing guidance.

Hollander Cohen & McBride
 Baltimore, MD
 Ph. 410-337-2121
 khofmeister@hcmresearch.com
 www.hcmresearch.com
Scotty McBride 500+ sessions since 1985
Betty Sherbs 300+ sessions since 1990

Multiple highly-experienced moderators on staff with expertise in many diverse industries including telecommunications, financial services, health care, real estate development, malls and shopping centers and on many diverse topics including branding, product development, logo development, product potential and advertising effectiveness using in-person focus groups, telephone/Internet focus groups and IDIs.



Horowitz Associates, Inc.
 New Rochelle, NY
 Ph. 914-834-5999
 info@horowitzassociates.com
 www.horowitzassociates.com
Howard Horowitz 1100 sessions since 1983
Adriana Waterston 350 sessions since 2001
Nuria Riera 85 sessions since 1999
Mariela Cufre 40 sessions since 2009
Stephanie Wong
Matt Zuckerman

HAI delivers full-service and a la carte research with 25 years of experience, across the country and internationally. Our sophisticated approach to research design and analyses ensures you get not only answers to questions but findings contextualized to inform strategic business decisions. Our moderators develop great rapport with subjects on a range of topics, including but not limited to: TV programming, sports, advertising, new technology, travel and social/political issues. Qualitative B2B and B2C services include focus groups/online focus groups, one-on-one/dyads/triads, ethnography, videography and social network/online community research. We're well-known for our expertise among Latino (Spanish/English; bilingual/bicultural moderators), multicultural and international consumers.

WE REALIZE THAT IT'S
 "LOCATION, LOCATION, LOCATION".
 SO WHICH LOCATION DO YOU PREFER?

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- (B) THE ORIGINAL OAK PARK FACILITY
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Illuminas

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Ph. 512-652-2700
solutions@illuminas-global.com
www.illuminas.com

Jay Shutter 1000+ sessions since 1998
Gordon Smith 2000+ sessions since 2000
Carrie Angiolet 500+ sessions since 2002
Stacey Ecott 350+ sessions since 2004
Robin Peto 350+ sessions since 2005

Illuminas is a full-service research consultancy dedicated to helping companies leverage market intelligence to gain leadership positions. Illuminas'™ researchers recommend the most appropriate combination of quantitative and qualitative research tools to meet client needs on a case-by-case basis and draw on nearly 15 years of experience. For qualitative research, our team specializes in a variety of techniques, including in-person and online focus groups, in-depth interviews, online bulletin boards, mystery shopping, ethnography and more. Our moderators are skilled at engaging respondents and have the expertise necessary to elicit insightful responses from IT and business decision makers, consumers, executives, employees and other constituents across a variety of industries.

Illumination Research

Cincinnati, OH
Ph. 513-774-9531
info@illumination-research.com
www.illumination-research.com

Karri Bass 2000 sessions since 2002

We are a market research firm with 30 researchers on staff. We offer proprietary capabilities, including our new Speed Suite, which delivers virtually instant qual or quant results while more than doubling your spending power.

InsideHeads, LLC

Online Focus Groups
St. John, U.S. Virgin islands
Ph. 877-464-3237
info@insideheads.com
www.insideheads.com

Jennifer Dale 1000+ sessions since 1998

Online focus groups, Web surveys and social media marketing research since 1998. Full-service, global marketing research services (quantitative + qualitative), including: recruiting, design, moderating, data collection and analysis. Developer of the popular virtual focus facility tool for real-time, synchronous chat groups, InsideHeads offers free training for moderators who want to DIY. Experienced, highly recommended, fast + efficient, fun to work with.



Issues and Answers Network, Inc.

Global Marketing Research
Virginia Beach, VA
Ph. 757-456-1100 or 800-23-ISSUE
peterm@issans.com
www.issans.com

Shelly Clark
Carla Lindemann
Peter McGuinness
Amber Reilly

Issues and Answers Network Inc. is a global marketing research firm providing cutting-edge quantitative, qualitative and hybrid methodologies - everything from survey and sampling design, in-house data collection and project management to data analysis, if needed. Four professionally-certified moderators will manage all aspects of qualitative projects - a sampling of experience includes focus groups, one-on-one interviews, dyads, triads and mini-groups - all conducted in multiple industries including alcoholic beverages, apparel, consumer durables, food, pharmaceuticals and telecommunications, just to name a few. (See advertisement p. 75)



Just Qual+

Just Qual+, LLC

Venice, FL
Ph. 941-882-0204
eric@justqual.com
www.justqual.com

Eric Swatek 16800 sessions since 1998
Laurie Quercioli 2200 sessions since 2008

Just Qual+ LLC is a boutique qualitative and quantitative health care marketing research firm with extensive global and online capabilities. Principal Eric Swatek is a PRC-certified Expert Consultant who has been serving both pharmaceutical and medical device clients since 1998. Laurie Quercioli, Vice President, is a RIVA-trained & certified Master Moderator working exclusively as a health care marketing research consultant since 2008, with previous industry experience in medical equipment, pharmaceutical sales, management and marketing. We have conversations with professionals, patients, consumers and caregivers in the U.S. and around the world.



Just The Facts, Inc.™

Knowledge Is Your Competitive Edge

Just The Facts, Inc.

Mt. Prospect, IL
Ph. 847-506-0033
info@jtfacts.com
www.jtfacts.com

Bruce Tinnell since 1984

Just The Facts Research Inc., strategic marketing qualitative experts; 20 years highly-experienced in a range of industries, topics and subject matters: B2C, B2B, services and more. Choose traditional, in-person qual or cutting-edge online/Web groups and interviews. JTF handles all setup, recruiting, moderating from A-to-Z, even Webcams! Our unique Qual-Quant™ methods yield keen insights through specialized unaided techniques. Innovative Web methods access our Virtual Pod Room for groups/IDIs using cloud technologies. Clients no longer need to travel but can watch and listen in convenience and comfort from anywhere with their own PC. JTF also recruits respondents across the U.S. or globally. Clients value our ability to bring out the best in group dynamics, uncovering business insights and opportunities with significant growth/ROI.

The Kiemle Company

Greer, SC
Ph. 864-640-1701
fkiemle@charter.net
Fred W. Kiemle 200+ sessions since 1980

Broad marketing research experience helps us choose the best approach for all qualitative and quantitative assignments. Our clients tell us we are skilled at asking the right questions and guiding them in what to do with the information. Ask us for a proposal. Clients choose us 85 percent of the time after reviewing our proposals.

Richard Kurtz & Associates

New York, NY
Ph. 917-301-8387
richard@rkurtzconsulting.com

Richard Kurtz 1000+ sessions since 1985

Research and consulting services with emphasis on qualitative research and international research assignments. Skilled in creative and strategy development. Offer telephone in-depth interviewing, ethnographic studies and project coordination for all types of research in all industry sectors.

Lamberts Consulting GmbH

Murnau, Germany
Ph. 49-8841-676-2237
elizabeth@lamberts-consulting.com
www.lamberts-consulting.com

Elizabeth Lamberts 3000+ sessions since 2001

Moderating in German, English and French, Elizabeth helps clients gain consistent findings across countries and tease out country differences. She comes up to speed quickly in challenging medical and technical topics and with six years client-side followed by 10 years of moderator experience, she understands underlying business drivers and implications. Inspired by genuine interest, respect and empathy for respondents, she gains honest and insightful feedback. Beyond her focus in health care, she enjoys moderating B2B and consumer studies and also implementing new client methodologies.

Listen Research, Inc.

Trabuco Canyon, CA
Ph. 949-216-9161
kim@listenresearch.com
www.listenresearch.com

Kimberlie Harmon 1000+ sessions since 1997
Anne Knight 600+ sessions since 1999
Brandee Hawkins 200+ sessions since

Listen Research is an experienced, elite team of professionals that grew up in corporations and large research firms. We provide qualitative and quantitative research services to a diverse portfolio of clients of all sizes. Our moderators have experience leading discussions with individuals from all walks of life - from business-to-business interviews with doctors and executives to friendship-pair groups with kids, teens/tweens and young adults. We are known for providing truly outstanding analysis, rich with results-oriented implications "enabling our clients to hear what people think" and in turn make smarter marketing, advertising and product development decisions.

Lohs Research Group

Inverness, IL
Ph. 847-359-0606
jan@lohresearch.com
www.lohresearch.com
Jan Lohs since 1987

Jan Lohs is known for qualitative research that brings depth of insight and understanding of consumers, businesspeople and employees. She is skilled at drawing out the personal stories that bring into the light - and to life - the unconscious drivers of attitudes and behavior. Insatiably curious and committed to going above and beyond on every project, whether domestic or international, Jan is passionate about qualitative!

M G Z Research

Rolling Meadows, IL
Ph. 847-397-1513
MGZipper@aol.com

Martha Garma Zipper 2300+ sessions since 1983

Premier Bilingual Latina Moderator- 20+ yrs experience: moderating, IDIs, and ethnography. Works in U.S., Puerto Rico and Mexico. Knows Latino population and degrees of acculturation. Expertise: ad testing, healthcare, retail, food products, consumer goods.

Market Probe International, Inc.

New York, NY
Ph. 212-725-7676
alan@marketprobeint.com
www.marketprobeint.com

Alan Appelbaum 100+ sessions since 1990

Market Probe International has a dedicated team of moderators and qual managers. We offer traditional qual research as well as hybrid and virtual/online focus groups, IDIs and bulletin boards in the US and worldwide. Excellent quality, timely performance and expertise derived from over 40 years of business operation. 20+ country international network with English speaking moderators.

**Market Research Answers, Inc.**

Irving, TX
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harold.gross@marketresearchanswers.com
www.marketresearchanswers.com

Harold Gross 1 sessions since 1997
William Mitchell 1000+ sessions since 1992
Melissa Flanagan 200+ sessions since 2005

Market Research Answers is a full-service market research consultancy, providing qualitative, survey and statistical analysis services to B2B and B2C clients across many industries and product categories. MRA moderators are seasoned professionals who have conducted hundreds of focus groups and in-depth interviews with a wide range of business and consumer respondent profiles for small, medium and Fortune 500 companies. We have deep experience interviewing health care professionals/specialists and C-Suite senior executives in the aerospace, food service, health care and hospitality industries. Our clients value our in-depth reporting and ability to mine insights which can be transformed into action items to improve the bottom line.

The Martec Group - Green Bay

Green Bay, WI
Ph. 920-494-1812 or 888-811-5755
linda.segersin@martecgroup.com
www.martecgroup.com

Chuck Bean 1000 sessions since 1987

The Martec Group, with offices in Chicago; Detroit; Green Bay, Wis.; Frankfurt, Germany; Beijing; and Shanghai, is a partnership of business-to-business and consumer market research professionals offering a full toolbox of qualitative and quantitative methodologies that have been developed to best meet our clients' needs. With a commitment to client relationships, Martec serves market segments that include, but are not limited to automotive, chemical, children, medical/health care, building industries, utilities/energy, sensory/foods, financial/investment/banks and executives/management.

Maryland Marketing Source, Inc.

Bay Area Research LLC
Randallstown, MD
Ph. 410-922-6600
cspara@mdmarketingsource.com
www.mdmarketingsource.com

Michelle Finzel 100+ sessions since 2004

Michelle Finzel is a RIVA-trained focus group moderator. She is experienced with qualitative and quantitative research methods, analysis, reporting and presentation, including focus groups, telephone interviews, intercepts, online and in-depth interviews.

MCC Qualitative Consulting

Secaucus, NJ
Ph. 201-865-4900 or 800-998-4777
info@ConsumerCenters.com
www.ConsumerCenters.com

Andrea Schragr 2500+ sessions since 1984
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Unlocking the inner voice of the consumer and generating actionable results takes innovative skills, experience and keen intuition. MCC, a dynamic research/consulting company, teams with domestic and international clients to anticipate trends and optimize insights - uncovering new opportunities to insure they stay ahead of the changing global market. Our consultants use qualitative and quantitative methodologies including focus groups, online modalities, depth interviews, quali-quant, ethnography, usability and eye-tracking. Expertise includes B2B/financial/communications/emerging technologies/retail/new products/travel/pharma/advertising.

Meadowlands Consumer Center

Secaucus, NJ
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Medical Marketing Research, Inc.

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**Morpace Inc.**

Market Research and Consulting
Farmington Hills, MI
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information@morpace.com
www.morpace.com

Donna Taglione 800+ sessions since 1989
Tim Taylor 700+ sessions since 1990
Kara Moylan 500+ sessions since 2003
Chris Leiman 300+ sessions since 2005
Susan Semack 200+ sessions since 1995
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Mark Styczenski 100+ sessions since 2008
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Morpace believes that recruiting and moderating are key to effective focus group discussions whether in person or online. Using a combination of methodologies and techniques, Morpace moderators tap into our expansive qualitative toolbox to design and implement a customized research approach that addresses your unique research objectives. Please contact us to find the right method and the right moderator for your next focus group project.

New York Consumer Center

New York, NY
Ph. 212-302-9393 or 800-998-4777
info@ConsumerCenters.com
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Mandel Schragr 2500+ sessions since 1985

NODO

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astrid@nodo-research.com
www.nodo-research.com

Astrid Velasquez 1000+ sessions since 1996

Over 14 years managing international and multi-country projects. Owner local offices and viewing facilities in Mexico City and Colombia. Expertise in focus groups, workshops, ethnography, in-depth interviews, bulletin boards, B2B interviews.

O'Donnell Consulting

William J. O'Donnell, Psy.D.
Narberth, PA
Ph. 610-410-8979
wodonnell37@comcast.net

William J. O'Donnell Psy.D. 1500+ sessions since 2000

Bill spent seven years as a cell biologist and team facilitator/trainer at SmithKline Beecham and four years at pharmaceutical market research firms Curtis Analytic Partners and V2 GfK before establishing O'Donnell Consulting in 2004. He has extensive new product and in-line domestic and international medical market research experience with both professionals and consumers across a broad variety of therapeutic areas. He has conducted professional seminars/workshops in the U.S. and U.K. and is a licensed psychologist.

On Point Strategies

West Des Moines, IA
Ph. 515-314-6568
tamara@on-pointstrategies.com
www.on-pointstrategies.com

Tamara Kenworthy, PRC, PCM 200+ sessions since 1997

Expertise in market research yet firm thinks like a marketer. Owner Tamara Kenworthy, MBA and professionally certified by MRA and AMA, brings a unique perspective in custom designing qualitative and quantitative studies and providing analysis/marketing recommendations.

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Minneapolis, MN
Ph. 952-924-0053
ptuch@aol.com
www.outsmartmarketing.com

Paul Tuchman 2000+ sessions since 1990

Full-service consulting and moderating since 1990. Broad experience across categories, segments, demographics; concept, positioning, product, packaging, advertising; clear, concise reports; seamless, single point of contact. Nationwide and overseas.

P & L Research, Inc.

Denver, CO
Ph. 303-770-1589 or 303-941-9605
pjolas@plresearch.net
www.plresearch.net

Philip Jolas since 1984

RIVA Institute-trained moderator with 25 years of client- and supplier-side experience. MBA with extensive business knowledge drives B2B focus groups and executive interviews deeper. Great rapport and projective techniques reveal B2C associations/motivations.

Panoptika, Inc.

Head of St. Margaret's Bay, NS, Canada
Ph. 902-489-3214
megann@panoptika.ca
http://www.panoptika.ca
Megann Wilson 600+ sessions since 1993
Steve Wilson 400+ sessions since 2001

Your customers are talking – are you listening? Panoptika combines our expansive research toolkit with facilitation, mentoring and planning to help you develop a richer understanding of your customers' wants and needs. With B2B and B2C experience, we approach your queries from a variety of perspectives. Clients value our willingness to explore sensitive or complex topics, and to always create the right questions to get them the answers they need.

**PLANET LATINO****Planet Latino Market Intelligence, Inc.**

North Miami, FL
Ph. 305-724-3826
latinoplanet@aol.com
www.marketplanetlatino.com
Horacio Segal 2400 sessions since 1994

At Planet Latino Market Intelligence, all we do is qualitative research - listening and learning from consumers face-to-face while surpassing cultural barriers. We have years of experience conducting focus groups, one-on-one interviews and ethnographic studies with consumers of all ages and various ethnic backgrounds. We are bilingual and bicultural moderators with experience in all categories, industries and markets, specializing in the Hispanic experience in the U.S. and Latin America, as well as the general market. At Planet Latino Market Intelligence Inc. we offer strategic consulting, delivering actionable results from multicultural insights.

Pranses Research Services

Hoboken, NJ
Ph. 201-659-2475
info@pransesresearch.com
www.pransesresearch.com
Terrence J. Pranses 500 sessions since 1992

We provide business-to-business, food/beverage, health care and nonprofit clients the insights needed to maximize marketing efforts. Tools include focus groups, in-depth interviews and online surveys.

**QualCore.com Inc.**

Minneapolis, MN
Ph. 612-377-3439
jeff.walkowski@qualcore.com
www.qualcore.com
Jeff Walkowski 1500+ sessions since 1989

Seasoned research consultant. Enjoys all qualitative research methods: in-person, phone and online - IDIs and groups. Offers creative yet practical research designs and flexible reporting options. Pioneer and recognized expert in the use of online qualitative methods. Trains traditional moderators to adapt their skills to the online environment (www.onlinemoderator.com). Member QRCA, MRA and AMA. PRC certification from the MRA.

REALeResearch

Oakland, CA
Ph. 510-832-6484
susan@realerresearch.com
www.realerresearch.com
Susan Reale 2000+ sessions since 1985

REALeResearch is a boutique qualitative research consultancy with expertise in gathering, understanding, and articulating consumer experiences. Our No. 1 goal is to provide businesses - from start-ups to Fortune 500 - with unbiased, on-target, insightful and valuable voice-of-the-customer feedback. With over 25 years of research experience, REALeResearch offers cost-effective, yet high-quality, research services.

Rebeca Cantú Helmstetler

Qualitative Researcher and Facilitator (Bilingual)
South Fork, CO
Ph. 719-850-8996 or 719-873-5240
rc@helmstetler.com
Rebeca (Becki) Cantú Helmstetler 500+ sessions since 1998

Work consultatively with research partners to develop strategies that translate into consumer understanding and help connect clients with their customers. Industries: financial services, health care/pharma, public policy, telecom, FMCG, travel and tourism, alcoholic beverages and more. RIVA graduate. NLP-certified practitioner. Trained facilitator. Spanish speaker. Excellent listener. Straight shooter. Marathon runner.

Research Explorers™, Inc.

Wilmette, IL
Ph. 847-853-0237 or 847-275-9502 (mobile)
lisa@researchexplorers.com
www.researchexplorers.com
Lisa McDonald 1200 sessions since 1994

Research Explorers Inc.™, est. 1994, provides actionable solutions through in-person/online focus groups, in-depth interviews and ethnographies. Expertise - African-Americans, financial services, health care, arts and culture and social issues.

Research Strategies, Inc.

Mobile, AL
Ph. 866-660-2910
rsincorp@bellsouth.net
www.researchstrategiesinc.com
Eugene (Gene) Talbott 900+ sessions since 1980

Research Strategies Inc. is a national full-service consumer and business-to-business market research company. Our stratified matrix sampling (RDD) can reach any marketplace by telephone, on-site and/or online data delivery.

Right Brain Discovery

Winston-Salem, NC
Ph. 336-499-1920
cchesner@rightbraindiscovery.com
www.rightbraindiscovery.com
Connie Chesner 1300 sessions since 2001

Talent at immediately building rapport, trust and insights with wide variety of respondents, no matter what the setting. Beyond categories below, industry experience includes B2B, education, consumer services, communications and loyalty.

RIVA Market Research

Rockville, MD
Ph. 301-770-6456
research@RIVAinc.com
Naomi Henderson 5000 sessions since 1978
(See advertisement p. 93)

RMS Communications and Research Inc.

North Hollywood, CA
Ph. 818-503-7721
rhndascott@earthlink.net
Rhonda Scott since 1992

Rhonda Scott has moderated, coordinated and managed general, multi-ethnic and African-American marketing research projects from inception to final presentation, with topics from communications, product testing, health care and public policy issues.

Roller Marketing Research

Gloucester, VA
Ph. 804-693-3208
rnr@rollerresearch.com
www.rollerresearch.com
Margaret R. Roller 2600+ sessions since 1976

The core of RMR is built on Ms. Roller's 38 years of professional moderating, her graduate training in research design and focused attention to each study. The emphasis is on collaboration leading to meaningful design, skilled execution, in-depth analysis and actionable results. No junior researchers, no ghost-writers. U.S. and international. Roller's design blog: www.researchdesignreview.com.

Sensory Works, Inc.

Sensory Consumer and Market Research
Rancho Santa Margarita, CA
Ph. 949-861-0102
rossella@sensoryworks.com
www.sensoryworks.com
Rossella Mazzuchelli 100 sessions since 1999

Create successful products and services that will delight your consumers. Discover consumers' likes and emotions and articulate key product characteristics. Turn this knowledge into relevant guidance for product development and/or optimization. Our moderator is RIVA Institute-trained, with 16 years of experience in qualitative as well as quantitative consumer research.

**Shugoll Research**

Bethesda, MD
Ph. 301-656-0310
info@ShugollResearch.com
www.ShugollResearch.com
Merrill Shugoll 2500 sessions since 1977
Mark Shugoll 1000 sessions since 1990
Sharon Stark 1000 sessions since 1982
Cara Shugoll 150 sessions since 2010

Shugoll Research is a national full-service market research firm founded in 1957. It is ranked as one of the top 100 U.S. market research firms (by Advertising Age). The company provides study design services, qualitative research recruiting, moderating, analysis and report-writing services. Our qualitative research division includes four on-staff, professional moderators who are nationally-known focus group moderators. We operate state-of-the-art focus group facilities at our Bethesda, Md., headquarters and also in Alexandria, Va. Eight focus group suites, IDI rooms, a CLT sensory lab, our own videostreaming service, usability lab, large consumer and professional database including policy elites.

SIGMA: Research Management Group

Cincinnati, OH
Ph. 513-979-2160
info@sigmaresearch.com
www.sigmaresearch.com
Foster Winter 2000+ sessions since 1981
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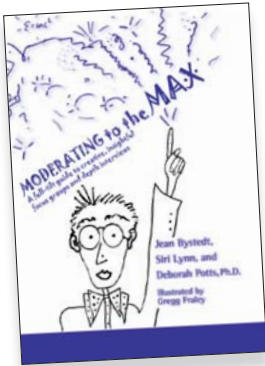
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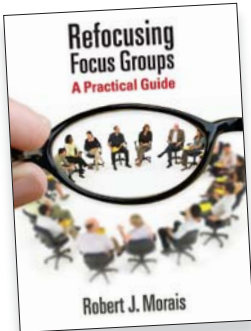
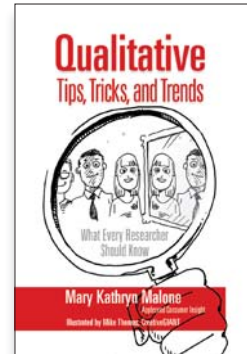
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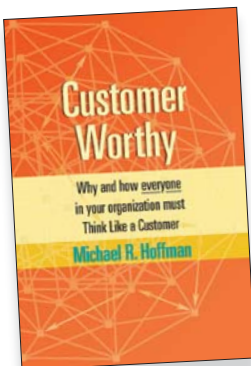
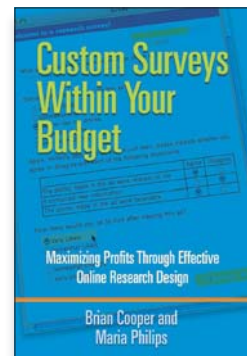
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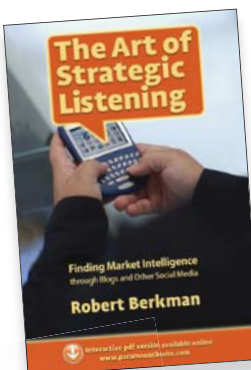
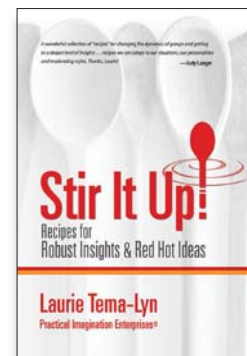
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BEFORE YOU GO ●●● issue highlights and parting words

●●● cover-to-cover

Facts, figures and insights from this month's issue

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It would not hurt if there were a role for journalists within MR or insights departments, perhaps with job titles such as storytelling director or chief research editor.

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For an audience that may be resistant to data-driven decisions, obfuscating the numbers can make it harder for them to be convinced.

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Would you rather your decision be based on precisely wrong or generally accurate information?

What our personnel changes mean for you!

We've been shaking things up here at Quirk's and we are excited to welcome two new staff members, Ralene Miller, directory editor, and Ilana Benusa, directory account representative. Additionally, Alice Davies has started a new position as news editor. You might be wondering what this means for you. Well, if you're a research company with a listing in our annual Researcher SourceBook, you have a new contact person - Ilana! You can expect to hear from her in the coming weeks as we prepare our 2014-2015 SourceBook for print in September.



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- Free article publication (submit articles for review by our editors)
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- Free listing enhancements in the directories for advertisers

Coming in the June Quirk's

●●● research software

Tim Macer and Sheila Wilson report on trends uncovered by the 2013 Market Research Technology Report.

●●● data security

20|20 Research's Isaac Rogers offers five simple questions for researchers to ask to better understand their fieldwork partners' data security practices.



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