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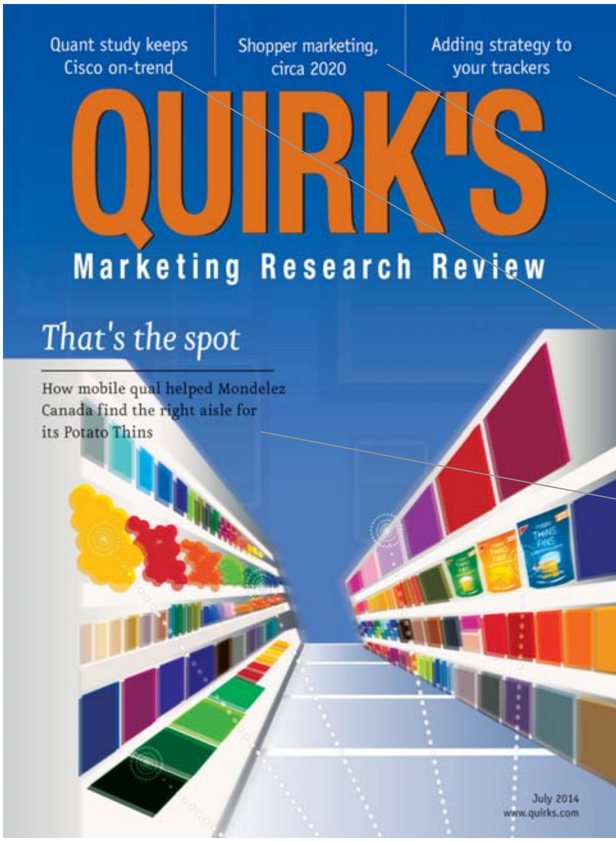

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••• online tools

10 ways Quirk's can help jump-start your career

Whether you're on the hunt for a new gig or want to bolster your case for a raise in your current one, Quirk's has the free resources to help you give your career a boost. Take a look at the list below and pick one, two, five or all 10 and you'll be on your way.

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4. Learn about the latest marketing research techniques by checking out articles online: www.quirks.com/articles/index.aspx

5. Join the discussion on our LinkedIn Group: www.linkedin.com/groups/marketing-research-insights-group-1772348

6. Add some clout to your CV by getting published in Quirk's: www.quirks.com/about/department/editorial/outside_submissions.aspx

7. Brush up on your research terminology by taking a spin through our glossary of marketing research terms: www.quirks.com/glossary/

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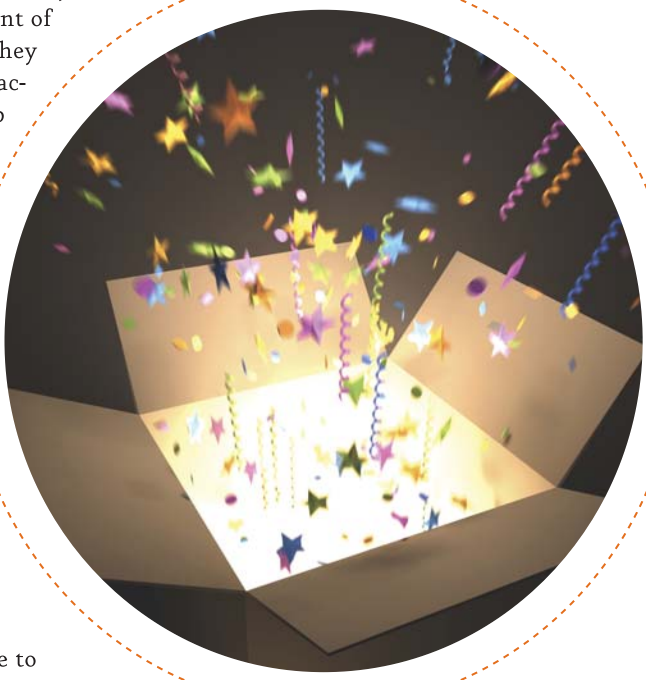
••• customer experience research

Consumers to brands: Stop trying to 'surprise and delight'

A survey conducted by Toronto-based IntelliResponse found that while most consumer-facing companies tout goals around surprising and delighting customers, consumers prefer an efficient customer service experience as opposed to a personalized one. When 1,000 U.S. online consumers were asked what type of relationship they want from the companies they buy from, 59 percent of respondents said they would like a transactional relationship where they receive efficient service and only 24 percent characterized their relationship as a friendship, where they get personalized service.



The survey also uncovered that 74 percent of consumers believe they should be able to get the same answers from a company's Web site that they can get from speaking to one of the company's call center workers. This is largely due to the expanding communication landscape, which now includes online portals, social media and mobile devices. It has become increasingly important for consumers to be able to find answers to their customer service questions online, especially given that 68 percent of survey respondents said a company's Web site is the first place they go when looking for information regarding a product or service.

For Millennial consumers, efficiency now means mobility. According to the IntelliResponse survey, 61 percent of respondents age 18-24 and 60 percent of respondents age 25-34 said they would rather use a mobile app for a customer service question than call a contact center to speak to a live representative.

quirks.com/articles/2014/20140701

••• television research

Dramas dominate prime-time

From family feuds to office backstabbings to actual stabbings in the back, American viewers love to watch the drama unfold on their TVs. According to a recent Nielsen Advertising and Audiences report, there are more dramas on prime-time TV this season than any other genre – accounting for 37 percent of all programming across broadcast and cable. Meanwhile, the sports genre was a close second, making up nearly a third (31 percent) of all prime-time programming.

But prime time is just part of the drama genre's dominance. Drama enthusiasts are also recording their favorite programming to enjoy at their leisure. The genre accounts for roughly two-thirds (62 percent) of prime-time time-shifted viewing, demonstrating that viewers are actively making a date with drama.

It's not just programmers and viewers who are drawn to dramas – advertisers have taken note of the genre's value too. And they're investing in this trend, spending $12 billion in 2013 to reach viewers who are notoriously glued to their sets. This was the most spent among all TV genres last year, followed by general news ($9 billion) and sitcoms ($6 billion).

But what's the value of drama's captive audience for advertisers? As noted in the report, Nielsen TV Brand Effect data has shown that when viewers are engaged in the content they're watching, they are also more engaged in the ads.

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Q Trade Talk

By Joseph Rydholm, Quirk's Editor

Label us skeptical of food label claims

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Joe Rydholm can be reached at joe@quirks.com

Like most consumers, I tend to take food companies' claims about the health benefits or wholesomeness of their products with, if you'll pardon the pun, a grain of salt. Sure, if it says "all natural" or "100% juice" my interest will be piqued but I always flip to the list of ingredients to see what's going on there.

Even that's no guarantee, though, as cases like the Pom vs. Minute Maid battle have shown. In that fracas, pomegranate juice kings Pom sued Minute Maid over the actual pomegranateness of Minute Maid's Pomegranate Blueberry Flavored Blend. Turns out the beverage is 99.4 percent apple and grape juice, 0.3 percent pomegranate juice, 0.2 percent blueberry juice, and 0.1 percent raspberry juice – all of which is permissible under FDA regulations.

When it comes to food labeling, what do consumers feel are some of the helpful and unhelpful terms? A February Harris Poll found that 73 percent of Americans see packages proclaiming their contents to be "fresh" as helpful in guiding them towards healthy choices. Fresh is at least a term about which there can be little confusion: only products which have never been frozen or warmed and which contain no preservatives can qualify for such a claim.

The following claims, which also have to meet strict criteria in order to qualify to be described as they are, were viewed as helpful by large percentages of respondents:

- high in/good source of (e.g., high in fiber, good source of calcium) – 73 percent;
- low (e.g., low sodium, low cholesterol) – 71 percent;
- free (e.g., fat free, cholesterol free) – 68 percent;
- lean – 65 percent.

As reported in the Harris Poll press materials, Americans are more divided on whether seeing "healthy" on a food package is a helpful indicator that nutrition lies within, with 53 percent feeling it's helpful and 47 percent indicating it's not. In fact, this claim is strictly regulated across a broad nutritional spectrum, with specific limits on fat, saturated fat, cholesterol and sodium content; products displaying this claim also need to have at least 10 percent of the recommended daily value for a range of nutrients.

There's a lot more latitude for food makers with statements like "made with" – as in, "made with whole grains" or "made with real fruit." These labels can be applied to anything that contains even very small amounts of the boasted content. Roughly three-fourths of U.S. adults (76 percent) feel that these types of statements are helpful in navigating their way to a healthy meal.

Majorities also find packages advertising their contents as natural, all natural or 100 percent natural (62 percent) and lightly sweetened or low sugar (60 percent) to be helpful. However, the FDA has never established an official definition for natural claims. Lightly sweetened and low sugar are similarly undefined, with the low sugar claim in particular sometimes drawing attention away from sweetening accomplished via other products.

Americans show mixed attitudes toward two labels which are helpful – to a point: a majority (57 percent) feel a "reduced" claim – such as "reduced calories" or "reduced fat" – is an indicator of a nutritious product, while fewer than half (45 percent) put the same stock in claims of "light" or "lite." These claims are in fact both strictly regulated by the FDA, with guidelines requiring they be specific percentages lower than comparable "regular" products in fat, calories or other criteria. This does not necessarily mean the products are low in these factors though.

When asked to select the most important consideration when deciding between food products at the grocery store, 49 percent of Americans point to cost. Cost is in this case followed distantly by combined (29 percent) mentions of fat (8 percent), caloric (8 percent), sodium (8 percent) and sugar (5 percent) content.

quirks.com/articles/2014/20140702

On May 30, 2014, FocusVison Worldwide and Revelation Global joined together to form a new kind of qualitative research technology company.

Over the past 20 years, web and mobile technology have given researchers unprecedented access to people's lives. As separate entities, Revelation and FocusVision created much of the technology that has expanded the possibilities of qualitative research.

<u>Together, we will deliver even better qualitative technology and support, anchored by the following beliefs:</u>

- We believe in the power of qualitative research, that people are more than a collection of data points. In a world awash with data, true understanding comes from engaging with people, seeing faces, and understanding human stories.

- We believe mobile, online and face-to-face research all have a role to play in helping researchers deliver better insights, faster and easier. We are now uniquely positioned to support face-to-face, online and mobile qualitative research in real-time and over-time, anywhere.

- We believe we have only scratched the surface of what is possible in qualitative research technology. By combining our talents and resources, we will fully realize the potential, the possibilities and the promise of greatness to come.

Our now combined team consists of 130 dedicated people located in Stamford, Portland, Atlanta, Chicago, London, Sofia and Singapore. Together, we can leverage our collective knowledge, reach and technology to benefit researchers around the world. We encourage you to explore all of our offerings:

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••• sports and leisure research

Sports fans going mobile

Some turn to Google+, Instagram during the action

The U.S. Know the Fan Report 2014, produced in conjunction with Kantar Media and SportBusiness Group, finds that the percentage of sports fans consuming content on mobile devices has doubled and the percentage of fans following sports on social media has more than doubled since the report was first issued in 2011.

The study, which surveyed over 1,000 American adults aged 18+ in February 2014, found nearly half of sports fans claim to use an Internet-connected device at the same time as watching sports on TV. Most often these second-screen fans like to catch up on what's happening with other games being played via live text commentary and live scores (44 percent), access non-sports related content (38 percent), communicate with friends via a second-screen device about the sports event on TV (21 percent), watch clips and highlights of other games being played (20 percent) and post comments to social networking platforms about the game/event they're watching (14 percent).

2014 has seen a significant increase in the number of fans following sports via social networking platforms, to the point where now over a third of fans consume sports on these platforms. Social networking fans are primarily younger fans, with 65 percent aged 18-34. Also fans typically use an average of two social networking platforms to follow sports. While Facebook (70 percent), YouTube (40 percent) and Twitter (24 percent) remain the most popular networks overall for fans to follow sports, fans are using them less as compared to last year to make use of newer social networking platforms such as Google+ (16 percent), Instagram (10 percent), Pinterest (8 percent) and Vine (6 percent).

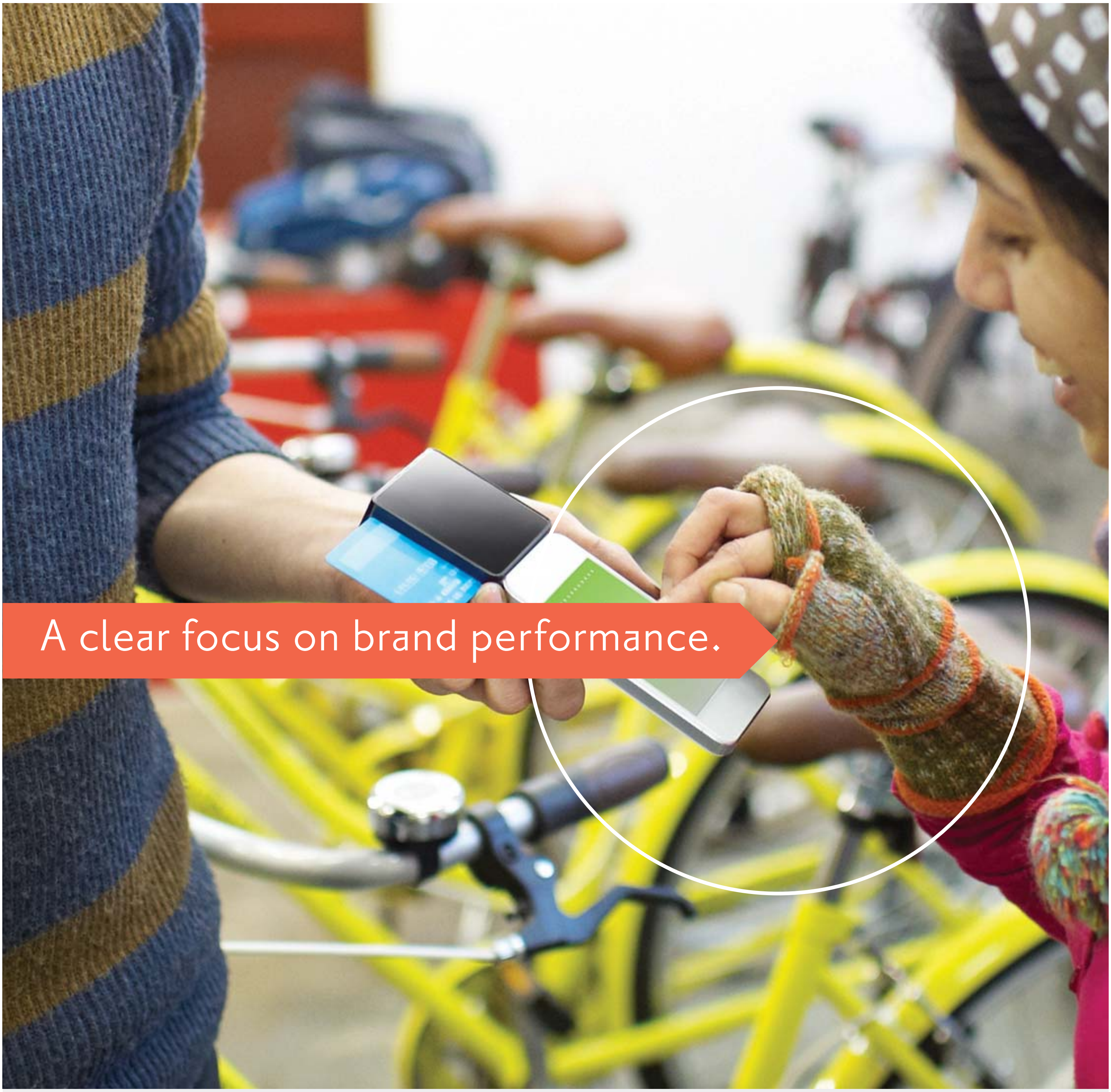
While mobile consumption of sports content has doubled to 42 percent (from 21 percent in 2011), sports fans still primarily use a computer/laptop computer to access online sports content (65 percent) and just over one-third access content on these devices at least once a day (38 percent). Smartphones are more widely used (34 percent) than tablets (22 percent) for the second year running, with smartphone usage still growing (up 10 percentage points) since 2013 and tablet usage remaining relatively flat (up 3 percentage points).

Among fans who watch sports online, live streaming remains the most popular content accessed (38 percent), followed by videos of game/event highlights (31 percent) and videos of sports news (27 percent). More than half of fans who watch videos of game/event highlights online (51 percent) and videos of player/manager/coach interviews (56 percent), do so via mobile device.

Sports news continues to be the most popular content read online (57 percent), followed by statistics and information (49 percent). This year has seen a greater demand for live text commentary of games (up 10 percentage points to 35 percent) as more fans are trying to keep up with events in real time.

The majority of sports fans who read sports news in text format online do so via a computer/laptop computer (82 percent). However, nearly half of fans who follow sports on mobile devices prefer apps to sites (44 percent) – and about one in four use only apps (24 percent). www.knowthefan.com/usa

quirks.com/articles/2014/20140703


A clear focus on brand performance.

••• online research

What is the Internet of Things?

Experts sketch a vision of our connected future

A March 2014 Digital Life in 2025 report issued by Pew Internet Project in association with Elon University's Imagining the Internet Center looked at the Internet's future. Some 1,867 experts and stakeholders responded to an open-ended question about the future of the Internet by 2025. They said it would become so deeply part of the environment that it would become "like electricity" – less visible even as it becomes more important in people's daily lives.

As reported by Janna Anderson, director, Elon University's Imagining the Internet Center; Lee Rainie, director, Pew Internet Project; and Maeve Duggan, research assistant, Pew Internet Project, to a notable extent, the experts agree on the technology change that lies ahead, even as they disagree about its ramifications. Most believe there will be:

-- A global, immersive, invisible, ambient networked computing environment built through the continued proliferation of smart sensors, cameras, software, databases and massive data centers in a world-spanning information fabric known as the Internet of Things.

-- "Augmented reality" enhancements to the real-world input that people perceive through the use of portable/wearable/implantable technologies.

-- Disruption of business models established in the 20th century (most notably impacting finance, entertainment, publishers of all sorts, and education).

-- Tagging, databasing and intelligent analytical mapping of the physical and social realms.

The Internet of Things (sometimes called the Cloud of Things) is a catchall phrase for the array of devices, appliances, vehicles, wearable material and sensor-laden parts of the environment that connect to each other and feed data back and forth. The Pew/Elon study garnered over 1,600 responses to a question about where the Internet of Things would stand by the year 2025. Survey respondents expect the Internet of Things to be evident in many places, including:

Bodies: Many people will wear devices that let them connect to the Internet and will give them feedback on their activities, health and fitness. They will also monitor others (their children or employees, for instance) who are also wearing sensors, or moving in and out of places that have sensors.

Homes: People will be able to control nearly everything remotely, from how their residences are heated and cooled to how often their gardens are watered. Homes will also have sensors that warn about everything from prowlers to broken water pipes.

Communities: Embedded devices and smartphone apps will enable more efficient transportation and give readouts on pollution levels. "Smart systems" might deliver electricity and water more efficiently and warn about infrastructure problems.

Goods and services: Factories and supply chains will have sensors and readers that more precisely track materials to speed up and smooth out the manufacture and distribution of goods.

Environment: There will be real-time readings from fields, forests, oceans and cities about pollution levels, soil moisture and resource extraction that allow for closer monitoring of problems.

Expert respondent Patrick Tucker, author of *The Naked Future: What Happens In a World That Anticipates Your Every Move?*, provided a nice working description of the Internet of Things, writing: "Here are the easy facts: In 2008, the number of Internet-connected devices first outnumbered the human population, and they have been growing far faster than have we. There were 13 billion Internet-connected devices in 2013, according to Cisco, and there will be 50 billion in 2020. These will include phones, chips, sensors, implants and devices of which we have not yet conceived."

Tucker went on to forecast the benefits of all this connected computing: "One positive effect of 'ubiquitous computing,' as it used to be called, will be much faster, more convenient and lower-cost medical diagnostics. This will be essential if we are to meet the health care needs of a rapidly aging Baby Boomer generation. The Internet of Things will also improve safety in cities, as cars, networked to one another and their environment, will better avoid collisions, coordinate speed, etc. We will all be able to bring much more situational intelligence to bear on the act of planning our day, avoiding delays (or unfortunate encounters) and meeting our personal goals. We are entering the telemetric age – an age where we create information in everything that we do. As computation continues to grow less costly, we will incorporate more data-collecting devices into our lives."

www.pewinternet.org/topics/future-of-the-internet/

••• customer satisfaction

Cell phones up, cable down, down, down

Satisfaction Index results chart consumer unhappiness

Subscription TV and Internet service providers (ISPs) have sunk to the bottom of the American Customer Satisfaction Index in its annual measure of communications industries. According to the latest ACSI results, ISPs dropped 3.1 percent to an ACSI score of 63 on a 100-point scale, while subscription TV fell 4.4 percent to 65. These industries, which include many of the same companies, are the worst-performing among 43 tracked by the ACSI. Meanwhile, customer satisfaction with cell phones improved 2.6 percent to 78 and wireless phone service remained at 72.

The ACSI report includes the annual measure of ISPs, subscription TV service, fixed-line and wireless telephone service, computer software and cell phones, as well as detailed findings for the top-selling smartphone brands available to U.S. consumers.

Customer satisfaction is deteriorating for all of the largest pay TV providers. Viewers are much more dissatisfied with cable TV service than fiber optic and satellite service (60 vs. 68). Though both companies dropped in customer satisfaction, DIRECTV (-4 percent) and AT&T (-3 percent) are tied for the lead with ACSI scores of 69. Verizon Communications FiOS (68) and DISH Network (67) follow. DISH Network may be the lowest-scoring satellite TV company, but it is better than the top-scoring cable company, Cox Communications (-3 percent to 63).

Cable giants Comcast and Time Warner Cable have the most dissatisfied customers. Comcast fell 5 percent to 60, while Time Warner registered the biggest loss and plunged 7 percent to 56, its lowest score to date.

"Comcast and Time Warner assert their proposed merger will not reduce competition because there is little overlap in their service territories," says David VanAmburg, ACSI director. "Still, it's a concern whenever two poor-performing service providers combine operations. ACSI data consistently show that mergers in service industries usually result in lower customer satisfaction, at least in the short term. It's hard to see how combining two negatives will be a positive for consumers."

High prices, slow data transmission and unreliable service dragged satisfaction to record lows, as customers have few alternatives beyond the largest Internet service providers. Customer satisfaction with ISPs dropped 3.1 percent to 63, the lowest score in the Index.

At an ACSI score of 71, Verizon's FiOS Internet service continues to lead the category, surpassing AT&T, CenturyLink and the aggregate of other smaller broadband providers, all at 65. Cable-company-controlled ISPs languished at the bottom of the rankings again. Cox Communications is the best of these and stayed above the industry average despite a 6 percent fall to 64. Customers rated Comcast (-8 percent to 57) and Time Warner Cable (-14 percent to 54) even lower for Internet service than for their TV service. In both industries, the two providers have the weakest customer satisfaction.

Customer satisfaction with cell phones is up for a second straight year, rising 2.6 percent to a new all-time high ACSI score of 78. Steady growth in the use of smartphones, which have much higher levels of customer satisfaction, helped drive the overall industry gain. However, as data usage increases, costs to access overloaded networks are high, leaving customer satisfaction with wireless service providers stagnant at an ACSI score of 72.

While Apple still sells nearly twice the number of smartphones in the United States as its nearest competitor, Samsung now comes out on top in one critical metric – customer satisfaction. Samsung surged 7 percent to an ACSI score of 81, beating Apple in overall customer satisfaction for the first time. Smartphones are becoming more dominant in Samsung's cell phone product mix, pushing its satisfaction score higher. Apple declined for the second year in a row (-2 percent to 79), and the field is getting tighter, with Motorola Mobility and Nokia (now Microsoft) both at 77. BlackBerry has seen its market share nearly vanish, but satisfaction climbed to 74 (+7 percent) for those customers that remain.

"Samsung has gone from up-and-comer to top-of-the-heap on the strength of its smartphone portfolio," says VanAmburg. "Apple's magic isn't gone but the luster has dulled on its older models. Each iteration improves on the last but Apple's year-long product refresh cycle is an eternity when a new Android phone seems to be released every week."

Among wireless phone providers, Verizon Wireless separated from the pack after climbing 3 percent to 75. T-Mobile (69), Sprint (68) and AT&T Mobility (68) are tightly grouped behind. As smartphone adoption continues to grow, network demands increase along with costs to the consumer, each contributing to stagnant customer satisfaction.

Customer satisfaction with fixed-line telephone service dipped 1.4 percent to an ACSI score of 73 but remained the most satisfying of all types of telecommunications. However, the score was due to shrinking landline usage. As more households abandon fixed-line service for cell phones, the customers that remain tend to be the most satisfied.

Computer software customer satisfaction is stable at an ACSI score of 76. Microsoft inched up 1 percent to 75, as did the aggregate of smaller software makers, but not enough to impact the industry as a whole. The rise of tablets and mobiles remains a challenge for traditional software makers looking to appeal to a new generation of consumers. www.theacsi.org

••• health care research

Few Americans say health care law has helped them

New policyholders more likely to have positive views

According to a survey conducted about one month after the new health care exchanges closed with over 8 million new enrollees, there has been little substantial change in Americans' perception that the health care law has helped them. Most Americans say the law has had no impact on their health care situation, while those who do perceive an effect are more likely to say it has hurt them rather than helped them. These data are based on interviews with over 2,500 Americans in a May 21-25 Gallup poll.

As reported by Gallup's Frank Newport, the majority of Americans have said that the Affordable Care Act has had little effect on their personal situations since Gallup first asked this question in early 2012. In more recent months, after the exchange-based enrollment opened up, Americans have gradually become more likely to indicate that the law has had an effect – both positive and negative. The current 24 percent who say the law has hurt them is by one percentage point the highest measured, while the 14 percent who say the law has helped them is also within one point of being the highest measured on that dimension. In all instances, across seven different surveys, Americans have been at least marginally more likely to say the law has hurt them and their families than to say it has helped them.

Americans' views on how the health care law has affected them personally are predictably partisan, as are almost all attitudes about Obamacare. The biggest partisan effect is evident among Republicans, with 41 percent claiming that the law has hurt them and their family. Democrats have opposite views, although more subdued, with 23 percent saying that the law has helped them, while over two-thirds say it has had no effect.

The goal of the law was to provide an insurance policy to the uninsured, particularly young, low-income and minority Americans. There is, however, little difference in the perceived benefit of the law among those aged 18 to 64. But, those younger than 30 are more likely than those who are older to say the law has both helped and hurt them.

Americans living in households with very low incomes (less than $24,000 a year) are slightly more likely than those with higher incomes to say that the law has helped them and slightly less likely to say that it has hurt them. Still, as many of this low-income group say the law has hurt them as say it has helped them.

Americans who say they obtained a new insurance policy in 2014 are significantly more likely than those who are insured but with the same policy as last year to say the new law has helped them, at 27 percent to 11 percent, respectively. Some of those who bought new policies this year did so because of mechanisms in the law, which others did so as a result of other factors, such as changing jobs. The number of Americans interviewed in this survey who have a new policy this year but were uninsured last year are more likely than average to say they have benefitted from the law, although their representation in the sample is quite small, making precise estimates of their attitudes difficult.

Americans who are currently uninsured by definition did not take advantage of the exchanges to get insurance, and, at this point, they are substantially more likely to say the new law has hurt them rather than helped them.

Americans continue to be more pessimistic than optimistic when asked to ponder the effect of the health care law on their family's health care situation "in the long run." About four in 10 say it will make no difference in the long run, while slightly fewer say that it will make their situation worse. Americans are least likely to say it will make their situation better in the long run (22 percent).

As of yet, there is no sign that Americans think the new health care law is having a net positive effect on their health care situations. The majority say the law has not affected them, while those who do report it having an effect are more likely to say it has hurt their health care situation rather than helped it. Americans also remain more negative than positive when asked about their views of the potential impact of the law on their family's health care situation in the long run.

Results for this Gallup poll are based on telephone interviews conducted May 21-25, 2014, with a random sample of 2,538 adults, aged 18 and older, living in all 50 U.S. states and the District of Columbia.

••• data privacy

Digital shoppers are open but wary

Some willing to trade data for deals

The vast majority (80 percent) of consumers aged 20-40 in the United States and the United Kingdom believe total privacy in the digital world is a thing of the past and nearly half (49 percent) said they would not object to having their buying behavior tracked if it would result in relevant offers from brands and suppliers, a new study by Accenture shows.

Privacy concerns aside, the survey of 2,012 consumers conducted in March and April 2014 indicates that they continue to embrace digital technology in pursuit of a good deal. In fact, nearly two-thirds of the respondents – 64 percent – said that when they are physically in a store, they would welcome text messages from that retailer alerting them to offers matching their buying preferences.

However, it's clear from the survey results that consumers continue to be cautious about the use of their personal information. According to the survey:

-- The majority of respondents – 87 percent – believe adequate safeguards are not in place to protect their personal information.

-- Sixty-four percent – compared to 85 percent from the 2012 survey – are concerned about Web sites tracking their buying behavior.

-- More than half (56 percent) say they are trying to safeguard their privacy by inputting their credit card information each time they make an online purchase rather than having that data stored for future use.

-- Seventy percent of respondents believe businesses aren't transparent about how their information is being used and 68 percent say there is not enough transparency around what is being done with their information.

-- A large number of respondents – 40 percent – believe only 10 percent of their personal data is actually private.

-- Although 42 percent believe vendors and suppliers are using their personal data in order to provide them with more relevant offers, 39 percent believe their data is being sold.

So how do businesses strike the right balance in providing consumers with what they want while taking their concerns about privacy into consideration? "In today's digital age where consumers are connected and empowered and data is abundant, businesses must align their organizations, technology and strategies to deliver relevant and loyalty-enabling experiences to their consumers," says Glen Hartman, global managing director of digital transformation for Accenture Interactive. "As the business leader who typically owns the customer experience for most organizations, the chief marketing officer should be in the driver's seat to encourage a customer-centric digital transformation that generates experiences to meet consumer needs."

The survey validates the fact that consumers are becoming increasingly demanding. Asked to rank the factors that would make them most likely to complete the purchase of a product or service, respondents' top three choices were sales and competitive pricing (61 percent), superior products (36 percent) and superior customer experience – both online and in-store (35 percent). Customer loyalty programs and relevant promotions followed, at 31 percent and 26 percent, respectively, but engaging advertising campaigns and celebrity endorsements trailed far behind, at 6 percent and 3 percent, respectively. "Price and quality are regularly recognized as purchase drivers," Hartman says, "but the fact that relevant and useful customer experiences trumped advertising, loyalty programs, promotions and endorsements in influencing purchase behavior was a key survey finding. It should be a huge wake-up call for CMOs.

"Businesses should align their marketing strategies using advanced analytics to drive real-time recommendations with the needs and interests of today's consumers, who demand a seamless omni-channel experience whether they choose to shop online or in a store," he says. "When pursuing that seamless customer experience, businesses must balance the need for security and data privacy with the desire to provide an exceptional customer experience. And it goes beyond marketing or shopping transactions. Businesses must embrace the full customer experience. The relationship with customers is defined by the experiences delivered across marketing, sales, service, online and offline, before, during and after campaigns and transactions – it should be a continuous engagement loop. Unless they can provide customers with the most satisfying experience possible, companies in all industries risk losing them to a competitor who can."

Further, the survey confirms that consumers in the 20-40 age groups are ubiquitous users of digital technology across multiple mobile platforms. Respondents own between three and four digital devices per person, on average, and 27 percent own more than four devices. They also spend an average of six to six-and-a-half hours per day using a digital device for personal activities including messaging/texting (48 percent), e-mailing (39 percent), getting news (27 percent) and shopping for a product or service online (20 percent).

According to the survey, businesses appear to be making a good effort to reach these customers: Nearly all respondents – 90 percent – said they receive notifications of upcoming promotions or new services with varying frequency and half say these communications help guide future purchase decisions. However, there is also a clear pecking order among the types of communications that consumers prefer to receive from companies: e-mail was the top choice for 93 percent of respondents, followed by social media (57 percent) and text (44 percent). Only 25 percent of survey respondents said they are comfortable receiving phone calls.

"Delivering relevant experiences based on intent will be a critical success factor for businesses in the next several years. In fact, this capability will draw a line in the sand between booming and struggling companies," says Hartman. "Importantly, since 51 percent of those surveyed said they would prefer for companies to stop tracking their shopping behavior, companies must find ways to establish more trust with customers and an effective formula for reaching them without crossing a data privacy line. For consumers there's a direct correlation between privacy tolerance and value."

The consumer survey was conducted by Coleman Parkes on behalf of Accenture Interactive. It was carried out online in March and April of 2014 with 2,012 consumers in the U.S. (1,000) and the U.K. (1,012). Participants were split equally between males and females between 20 and 40 years of age, and the survey recorded income, ethnicity and sociodemographics.
www.accenture.com

IN FOCUS

Product and Service Update

••• mobile research

Footprints visualizes mobile visitation behaviors

A location-based 'digital cookie'

New York-based xAd, a global location ad platform, has unveiled Footprints, a visualization product that allows users to view mobile visitation behaviors as they happen in real time at over 14 million businesses nationwide. As consumers engage with their phones throughout the day, they often share their device location information with their favorite sites and applications. This data exchange normally occurs to make their mobile experiences more efficient or relevant to what they may be doing at any given time or place. It is through this anonymized location data that Footprints is possible, essentially turning a device's location data into a new kind of digital cookie. Marketers can understand their consumers' digital behaviors, viewing activity by category or specific brand, and as broadly as nationally or as granular as by neighborhood. Footprints is currently available in limited beta.
www.whatsyourfootprint.com

quirks.com/articles/2014/20140704

••• forecasting research

CivicScience launches Expectation Science methodology

Seeks MR partners

Technology-based consumer sentiment research company CivicScience launched Expectation Science, a methodology designed for improved forecasting in consumer marketing and media consumption. The methodology merges large-scale data modeling with predictive consumer survey techniques and was developed in partnership with academic teams from Carnegie Mellon University and others. CivicScience is seeking to partner with consumer marketers for the next phase.
www.civicscience.com

••• eye-tracking research

Tobii Glasses 2 launched

Now lighter-weight, HD

Stockholm eye-tracking company Tobii Technology has released Tobii Glasses 2. The glasses aim to provide a lightweight frame with a host of new features, including: live view, a live viewing feature that allows researchers to watch a video stream of exactly what a person is looking at, wirelessly and in real time on any Windows 8 tablet, while moving around freely in any environment; true view, a wide-angle 1080p HD scene camera and four eye cameras, designed to give the wearer complete freedom of view and enable eye tracking of the "true view" of what participants see in large gaze angles, including peripheral sight; and flexible mapping, a new flexible manual mapping tool that reduces time for coding videos with gaze data to help researchers aggregate and process data from multiple participants related to specific objects in the study environment, such as a store shelf or a second screen.
www.tobiiglasses.com

••• mobile research

uSamp debuts two new mobile survey options

In-Home, In-Store

Encino, Calif., research firm uSamp announced two new products, Mobile In-Home and Mobile In-Store, designed to capture real-time consumer interactions with products and to measure ad awareness and exposure. The In-Home tool is aimed at showing how consumers use their products at home and providing feedback on product appearance, packaging or use. The In-Store tool is designed to help retailers measure shopper reactions at the point-of-purchase as well as aisle flow, signage impact and packaging appeal, shelf presence and pricing strategies.
www.usamp.com

••• promotion research

Drill down into marketing campaigns

Measure social media sharing

Salt Lake City technology firm TreeHouse Interactive has enhanced its TreeHouse Interactive Marketing View, designed to help marketing professionals compare and drill down into marketing campaign performance data and more effectively evaluate campaign outcomes. The enhancements are aimed at helping users better compare performance metrics across campaigns; capture more data and create reports faster with greater grouping flexibility; export results data and share dynamic chart/graph reports among colleagues; reduce e-mail testing and nurturing-path testing time; better understand e-mail interactions and behaviors, including social media sharing, conversation rates and forwards; break down recipient e-mail client statistics by OS (Webmail/Gmail/Outlook/Apple Mail/Windows Phone/etc.); and gain better insight into the types of recipient devices used (smartphone/tablet/personal computer).
www.treehousei.com

••• data visualization

DataPad offers data viz tool

Expanded beta available

San Francisco-base DataPad has released it eponymous data visualization and collaboration tool. DataPad aims to democratize data through easy point-and-click integration with the most common data sources and speed-of-thought visual exploration and analytics. It also includes collaboration features that enable everyone on a team to engage with data through fast visual discovery and share analytics through the cloud. The DataPad client, with its visual interface, works across desktop and mobile touch-based devices.
www.datapad.io

••• demographic research

Site tracks U.S. move to a multicultural majority

Are you ready, South Carolina?

Research consultancy EthniFacts has launched the America Reimagined Web site and CulturEdge Countdown Clock, which sets the tipping point moment for the U.S. to pass 50 percent in its multicultural mix on August 22, 2014 at 7:56 p.m. EDT. Existing projections for a multicultural America, using only individual race and Hispanic origin status, put the minority-majority tipping point at 2043. The new EthniFacts tipping point was calculated by using the Interethnic Proximity Index, a proprietary algorithm that takes into account multiracial populations, intermarried couples, mixed households and residence location, among other factors, to provide a truer indicator of multicultural influence in American society.

In addition to the U.S. Countdown clock, the America Reimagined site also features clocks showing the next state (South Carolina) and next metro area (Seattle/Tacoma) projected to cross the multicultural tipping point, on August 1st and July 19th, respectively.

The Web site also features a map of all U.S. states comparing the IPI Index to the U.S. Census multicultural percentages, and EthniFacts Insight reports on the demographic imperative for multicultural civic and social engagement, the substantial diversity of the white population, evolving ethnic identities, and other cultural and consumer-oriented research.
www.americareimagined.com

••• health care research

Cello Health Insight launches mobile apps

Gather info from patients, health pros

London research company Cello Health Insight has launched two mobile apps, eVillage and Cello Health, to gather information from patients and health care professionals. The eVillage app is intended to collect qualitative data from discussion groups and private diaries and the Cello Health app is designed to collect quantitative measures along with media and location data as needed.
http://cellohealthinsight.com

••• demographic research

dunnhumbyUSA, Xavier measure U.S. quality of life

Tracking the American Dream

Cincinnati-based dunnhumbyUSA is partnering with Xavier University's American Dream Composite Index (ADCI) to measure the quality of life of people living in the United States. The ADCI is a measure of American sentiment, predicting behavior and attitudes in multiple arenas including the home, the workplace and the marketplace. The data comes from a monthly, quantitative index that surveys 1,000 people across the U.S. on issues pertaining to their financial, personal and societal well being, as well as their views on diversity and their physical environment. The survey asks for responses to 139 statements or questions on a five-point scale. The ADCI survey reveals variations in the quality of life dimensions across various demographic groups.

The American Dream Composite Index is a part of Xavier University's Center for the Study of the American Dream. The Center was founded in 2007 by 1970 Xavier graduate Mike Ford. Since the beginning, Xavier University has fully funded the Index. Now, dunnhumbyUSA has stepped forward as a partner to support and sponsor the program for three years.
www.dunnhumby.com

●●● Briefly

■ Herndon, Va., research company ORI has launched Audience Insights, designed to provide quantitative feedback on business and public policy conferences and events and assess speaker effectiveness; sponsor/exhibitor lead-generation; participant satisfaction and willingness of attendees to recommend the event.
www.oriresults.com

■ New York-based Nielsen will begin measuring mobile video-watching through its Nielsen Online Campaign Ratings software and will include the statistics in its Online Campaign Ratings in Q3 and its C3 TV rating this fall. The software is designed to provide viewer measurement across TV, online and mobile sources. Nielsen and NBCUniversal tested the new format during the 2014 NBC Winter Olympic games.
www.nielsen.com

■ Franklin, Tenn., Harpeth Marketing has released *Marketing and Sales for the Market Research Firm: the Exhibitor's Workbook*, a 12-page e-book that can be downloaded for free at http://bit.ly/eBook6PR. Written for firms in the market research industry, it focuses on helping readers to understand the process of exhibiting at conferences and then how to implement that process to help make it a successful event.

■ Research companies Schlesinger Associates, Iselin, N.J., and Affectiva, Waltham, Mass., have partnered to adapt Affectiva's Affdex automated facial analysis technology for moderator use in focus groups and in-depth interviews. The new technology is designed to measure facial responses to video stimuli and relay them to a moderator console.
www.schlesingerassociates.com

■ Horsham, Pa., research company Symphony Health Solutions will begin providing weekly reports on pharmaceutical sales. PHAST 2.0 Integrated Weekly will summarize retail pharmacy activity and non-retail institutional sales; PHAST 2.0 Institutional Weekly will summarize institutional sales. This data was previously only available on a monthly basis.
www.symphonyhealth.com

■ Framingham, Mass., research company IDC Retail Insights has published its 2013 Annual Shopper Survey in the new report Green Lights and Bright Red Lines: Relevancy and Privacy Challenges for 2014.
www.idc.com/prodserv/insights/retail/index.jsp

■ Los Angeles-based j2 Global Inc., has added A/B split testing with its Campaigner e-mail tool. The A/B split testing tool is designed to test various versions of an e-mail on a sample before being sent to the full target list.
www.j2global.com/

■ Fresno, Calif., research company Decipher Inc. has integrated the Pro-T-S CATI software of Marketing Systems Group, a Horsham, Pa., research company, to Beacon, Decipher's survey and reporting platform. The integration is designed to provide more efficient CATI research through advanced dialing and sample management.
www.decipherinc.com

■ Eindhoven, the Netherlands, technology company CMNTY Corporation has released CMNTY Panel, designed to provide fast sampling and multiple database management to online communities.
www.cmnty.com

■ Research company Mashwork, New York, has launched Canvs, a social TV analytics tool designed to provide instant qualitative feedback from TV and movie audiences.
www.mashwork.com

■ Birmingham, U.K., research company Workflows has launched Smart In-Store, a research service that utilizes respondents' smartphones to provide feedback with photographic text messages.
www.workflows.co.uk

■ Waltham, Mass., research company Affectiva has launched Affdex Discovery, an automated facial coding software designed to record participants' facial expressions via Web cam as they view online content, process and analyze the information and send the results to the researcher.
www.affdex.com

■ Surrey, U.K., research company Bonamy Finch has launched Sig Tester, a free app providing a quick analysis if results are statistically significant, an estimate of confidence intervals and sample size requirements. It is available at the Apple App Store and Google Play for Android.
www.bonamyfinch.com

■ Seattle-based Blab's BlabPredicts software has been integrated into THE LOOP software of New York

research company Mindshare North America. BlabPredicts is a predictive marketing analytics platform designed to predict future conversation resonance. Addition of THE LOOP is intended to provide access to earlier data, which will allow marketers to adjust media spend and content across their entire marketing platform.
www.blabpredicts.com

■ London research firm Dub has added its MarkUp concept testing tool to the suite of tools available with its IdeaStream platform.
www.dubishere.com

■ Facebook, Menlo Park, Calif., has launched Audience Insights, an analysis tool, as part of its Ads Manager service. Designed to provide demographics, page Likes, location, language and Facebook access frequency and devices, it will be available in the U.S. immediately with rollout to remaining areas in coming months.

■ Austin, Texas, research company Bazaarvoice has launched software programs Bazaarvoice Curations, Bazaarvoice Local and Bazaarvoice Product Sampling, designed to expand the capability of its Bazaarvoice Conversations.
www.bazaarvoice.com

■ Shanghai research company nQuire and Beijing software company Wei Chai Shi have launched a mobile panel CrowdSurvey, described as China's largest mobile research panel, with 1.3 million users.
www.nquirechina.com

■ Ghent, Belgium, software company NGDATA has launched Lily Enterprise 3.0, software designed to collect information from customer interactions, create detailed customer profiles and facilitate delivery of highly-targeted product offers and content.
www.ngdata.com

■ London research company Kantar Worldpanel and IMRB International, a Mumbai, India, research company, have launched Kantar Worldpanel, which merges the IMRB Indian panel with Kantar's former MarketPulse network of panels in Europe, Asia, Latin America, the Middle East and Africa.
www.kantar.com

■ Berkshire, U.K., technology company GenieConnect released its iBeacon-enabled software designed to send conference session information to attendees' mobile devices and to collect audience response. A PowerPoint plug-in is intended to allow the presenter to send slides to an attendee's smartphone or tablet and to lock the handset screens to minimize distractions.
www.genie-connect.com

■ San Diego, Calif., software company Emotient launched its Google Glass application designed to detect and process facial expressions in the Glass wearer's field of view by displaying colored squares which indicate the recognized emotion.
www.emotient.com

■ Reston, Va., research company Resonate has launched Resonate Analytics software, designed to provide access to Resonate's database of audience feedback through a Web-based application and to reach audiences across mobile, social and video platforms.
www.resonateinsights.com

■ San Francisco retail analytics company Euclid has launched a reseller program for certified partners to sell its Euclid Express mobile location analytics technology. The software is designed to collect and analyze anonymous data on number of visitors, how long they stay and how often they return. Technology companies General Datatech, Dallas, and Tekmark Global, Edison, N.J., are the first partners in the program.
www.euclidanalytics.com

■ The Mobile Marketing Association has launched the MMA Case Study Hub, designed to be a fully searchable database of 450+ mobile marketing case studies from over 40 countries. The case studies were collected through the curation of the MMA's annual Smarties Awards submissions.
www.mmaglobal.com

■ New York researcher the Nielsen Company has launched demographic data for Nielsen Twitter TV Ratings which include the age and gender of people who tweet and people who see tweets about TV.
www.nielsen.com

■ London software company Thunderhead.com has launched its SaaS-based ONE Engagement Hub, designed to streamline collection of customer interactions while delivering the information to all relevant business departments.
www.thunderhead.com

■ Facebook and Paris communications company Publicis Groupe announced a multi-year partnership for developing ad targeting and measurement products around Facebook and Instagram data, video and images. Terms of the agreement were not disclosed.

■ Melbourne, Australia, research company Effective Measure has launched EM Mobile, software aimed at providing demographic profiles of mobile users. The program includes an app designed to summarize the survey responses in real times.
www.effectivemeasure.com

■ Tokyo firm Research Panel Asia launched its surveyon Partners platform, designed to assist its clients in using their current networks of users, members and panelists with a "cloud console" format.
www.researchpanelasia.com

Using conjoint to fine-tune your brand's messaging

| By Steven Struhl

snapshot

Steven Struhl shows how conjoint analysis can help determine the best mix of elements in ads, direct marketing and Web sites.

Conjoint analysis has a long history as a powerful method for developing the best set of features for products and services. Its strengths in creating the best mix of elements in communications, though, are less well-known. Its newest application, for improving Web sites, while in its beginnings, already is showing great power and promise. This method allows us to see the value of hundreds or even thousands of alternative communications, all in a single test.

We will first briefly explain conjoint and how it works and then go on to the specific applications.

Advantages immediately apparent

Conjoint was hailed as one the greatest advances in determining what people really wanted when it first appeared somewhere around 1975 – and for many years following. Several advantages were immediately apparent. First, it asked people to trade-off valuable features vs. each other, rather than just rating features in isolation.

The way people use rating scales posed (and still poses) one of the thorniest problems in learning what is actually important to them in a product or service. As we can see by looking at the importance ratings of a fictional respondent in Figure 1, it is easy to rate everything as highly important – and that is what people generally do when asked outright to rate individual features of a product or service.

Conjoint moves well beyond this by showing features in the context of the overall product – at least in its full-profile version. Full-profile simply means that study participants respond to a whole product or service, typically described as a set of features or attributes. (There are other variants of conjoint, including partial-profile and adaptive – but in recent years these seem to have had relatively little use.) Conjoint shows people a number of product descriptions or profiles and asks either for ratings (or more rarely) rankings of each.

Let's move on to a venerable example dating to the 1990s, the industrial macerator. This is a strictly fictional machine but it does have a marked resemblance to a real one. Our ersatz

Figure 1

	How important to you is each feature?				
Features of your floor-standing wine cooler	Not at all important	Not too important	Somewhat important	Very important	Critical
Lowest price	☐	☐	☐	☐	☑
Thickest insulation	☐	☐	☐	☐	☑
Genuine gold plating	☐	☐	☐	☑	☐
Built in icemaker	☐	☐	☐	☐	☑
Parking brake to prevent slippage	☐	☐	☐	☐	☑
UL listed	☐	☐	☐	☐	☑
Battery backup for power outages	☐	☐	☐	☐	☑
Extendable handle with umbrella	☐	☐	☐	☐	☑
Extra wide mag wheels	☐	☐	☐	☑	☐

quirks.com/articles/2014/20140705

client, Ace, nearly owns this market, with an 81 percent share. This will make conjoint a good choice for figuring out how to improve its machines. (We will talk briefly about using conjoint vs. using discrete choice modeling later.)

Let's discuss the different features and the ways in which they can vary. The different variations of a feature, as a reminder, are called its levels. Here are some facts about the machines, and then the levels that our client wants to test.

Price: These machines can cost between $46 and $88 million. Ace, however, considers itself the quality leader and so will not sell any machine for less than $52 million. It will not bother testing the lower prices used by its main competitors, Puny Industries and Insignificant Corp.

Sparge pipes: They can have two, four or six pipes. Ace has just patented an eight-pipe "professional" design, which it wants to introduce and hopes will be the next big thing in macerators.

Extra features: These machines also can have three to 17 high-speed stridulators.

Colors: They come in a wide range of attractive shades: black, brown, olive drab and pink.

Here is what Ace decided to test:

Price: four levels – $52 million, $60 million, $74 million and $88 million.

Sparge pipes: four levels – two, four, six and eight.

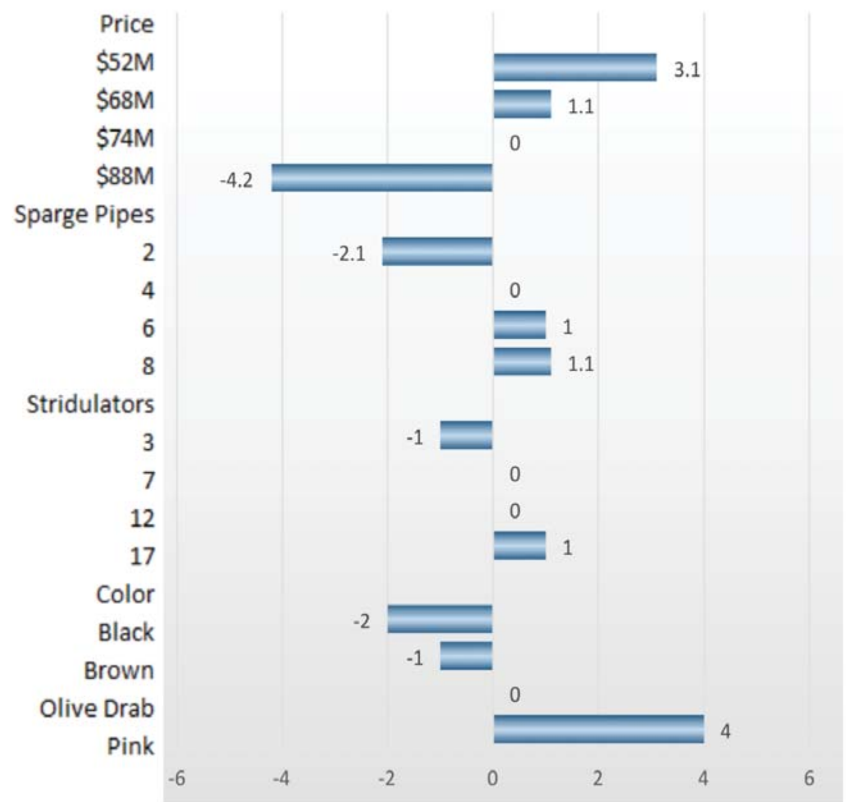
Stridulators: four levels – three, seven, 12, 17.

Color: four levels – black, brown, olive drab and pink.

With just these features and variations, there are 256 possible configurations (4 x 4 x 4 x 4). Conjoint analysis allows us to use very carefully constructed subsets of these, based on an experimental design. Experimental designs enable us to vary many attributes at the same time and still measure the effects of changing each one separately. We will need to show just 16 carefully configured product profiles to determine the worths of all 256 possibilities.

Here is a sample of a conjoint screen (or card, as they are sometimes still called) that a respondent would see and evaluate.

Figure 2



If the industrial macerator had the features you see below, how likely would you be to buy it? Please think of just this macerator and nothing else you may have seen. Assume you really need a macerator. Please use a 0% to 100% scale. You may use 0%, 100% or any number in between, depending on how likely you are to buy a machine like this.

Price	$74 million
Sparge pipes	8-pipe professional
High-speed stridulators	12
Color	Pink
How likely would you be to buy this machine on a 0 to 100 scale?	

With everything analyzed, a summary of the values or utilities of the different attribute levels emerges. These utilities clearly show what is most desirable.

Figure 2 shows how the utilities look. Reviewing this chart, we can see that the marketing department was right and the unit really needed to be a new color. Also, we see that dropping the price to the lowest level is what the market wants, and that the eight-sparge-pipe "pro model" is not too likely to revolutionize the industry.

When questions arise about how much good any change will do in the marketplace, conjoint analysis must make assumptions about how utility values become market share. This has been a historical weakness of conjoint analysis: It is wonderful at showing the relative values of different features – and variations in those features – but it does not do well enough at showing effects in the marketplace. For that we need to use discrete choice modeling (DCM) or, as it is sometimes called, choice-based conjoint.

Go directly to behavior

Fortunately, when we are dealing with messages, we are trying to pick the best alternative – so the issue of how utilities become marketplace behavior is largely sidelined. And with Web sites, even though we still use a conjoint-style approach, we go directly to behavior, such as clicks or stickiness (how long a person stays on the page or site). Because we are interested in what generates the most behavior, we will again steer clear of the problem of estimating market shares. And again, anywhere we use conjoint, we get the equivalent of testing hundreds or even thousands of alternative message configurations, all in one simple test.

Some disagreement exists about the differences between discrete choice modeling (DCM) and conjoint. For our purposes, if you are using rating scales as

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Figure 3

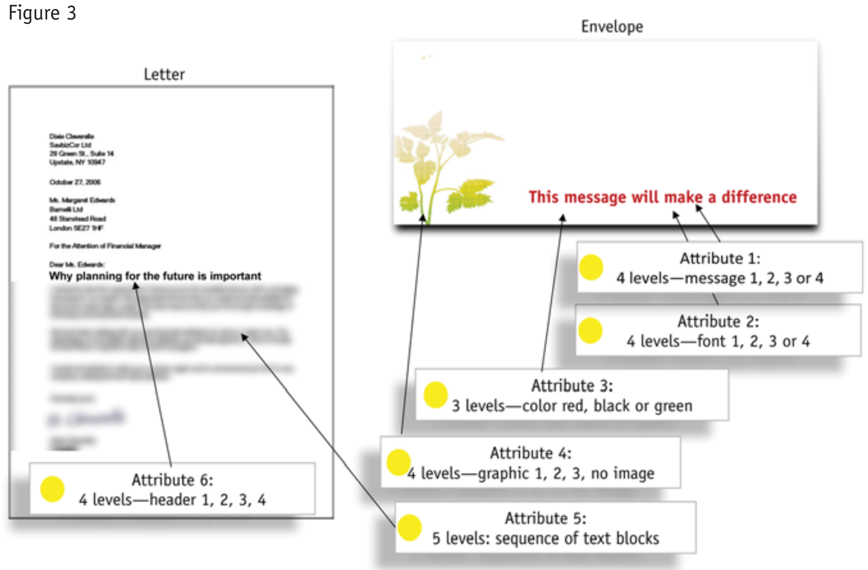
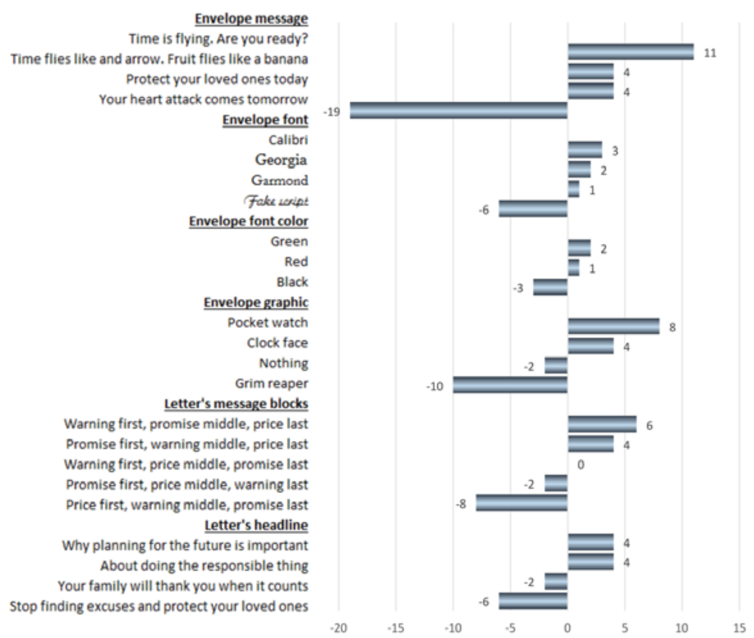


Figure 4



part of a trade-off exercise, then that is conjoint. If you are showing products side by side and asking people to make choices, then that is DCM. Showing people one thing at a time most often means you are using conjoint analysis. That is why we are calling the extension of this method to testing Web sites "conjoint," even though we are measuring behavior there.

Our first example is a direct mail piece, one of those insurance offers we all look forward so much to receiving. It's an early, fictionalized instance of conjoint being applied to develop the best mix of elements in a message. Because these insurance offers are designed to work with very low level of responses (often under 1 percent), even a fractional improvement can make a vast difference. If you move from 0.8 percent to 1.0 percent response, you have increased your sales by 25 percent (that is, this is the 0.2 percent increase divided by the 0.8 percent base rate).

There are two components to this offering: the envelope and the letter. Figure 3 shows a disguised idea of what was tested. There are six features or attributes that get varied. Counting the variations or levels we get to how many cards, or message profiles, we will need to show. The more attributes and the more variations per attribute, the more cards or profiles we will need.

Specifically here, we have four attributes each with four levels; one attribute with three levels; and one with five levels. There is a formula for how many cards this will require. First, we take the number of attributes times the number of levels. Specifically, we have (4 x 4) + (1 x 3) + (1 x 5); that comes to 16 + 3 + 5 or 24. Then we subtract out the total count of attributes, which is 6. That gives us 18. We need to add back two more so that we can measure error and we can estimate a term called the constant.

We have just measured degrees of freedom (which some of you may recall with dismay from your statistics classes) and made sure that we have at least one card for each degree of freedom.

We finally used 24 cards and showed each person eight of them. That is, everybody saw just one-third of the total cards. So, in effect, everybody counted for just one-third of a complete set of responses, or perhaps, one-third of a whole respondent.

As an aside, when we did this many years ago, it required us to triple our sample. Now though, thanks to the nearly magical-seeming properties of hierarchical Bayesian analysis, we actually can get much more per respondent. We might possibly even get away with no increase in sample, although experience has shown that when dividing the total task into three pieces, boosting the sample by 50 percent is safer.

Back to our main story, here is the way the utilities looked (in Figure 4). Here we have tested the equivalent of 4 x 4 x 3 x 4 x 5 x 4 or some 3,840 alternative combinations of message elements, and have found the apparent best one:

- Time is flying. Are you ready?
- Calibri font on envelope
- Green ink on envelope
- Letter: Warning first, promise next, message last
- Letter: Why planning for the future is important

In this instance, there was a direct way to test whether this combination worked, as the design the client was using was one of the combinations with lower total utility. And by switching, the client actually improved its response rate by some 25 percent, just reaching the magic 1 percent acceptance mark. So this was an early success story.

Our second example comes from a test of a print advertisement. The same

Figure 5

Figure 6

principles hold as in the test of the direct mail campaign. Figure 5 shows our slightly fictionalized ad and the elements varied in it.

Here we would have an immense number of possible variations. That is, we would have: 3 x 3 x 3 x 3 x 2 x 3 x 3 x 3 or 4,374 possible ways of combining these elements.

We can determine the value all of them with 18 experimentally-designed combinations.

How would this look to a study participant? In Figure 6 we see how one profile in the test would look, using another combination of elements based on the experimental design.

This was an online test, with each person exposed to eight alternative combinations or profiles out of a total of 24 used for the test. Accompanying the Figure 6 test were these instructions:

Assuming this was the only message about this product, how likely would you be to prescribe the product to a typical patient with atypical depression? Please think of just this message and use the 0 to 100 scale where 0 means "absolutely unlikely" and 100 means "absolutely likely." You can use any number from 0 to 100, but try not to rate any two messages the same, as they are all different.

The outcome

Based on this test, the client was able to determine easily which of the over 4,300 possible combinations generated the most interest. This was done with a chart showing the basic utilities, just as we did in the last example. This study, however, involved another interesting issue, which we could call the presence of a HIPPO. A HIPPO is simply the highest paid person's opinion. The Big Boss really wanted to know how a few of his favorite ideas played out against the best combination.

This seemed to call for a simulator, similar to a market simulator, but in this case with the overall rating as the outcome. Figure 7 gives an idea of how the simulator looked.

As we can see, the Big Boss' favorite is roughly one-third as well received as the best possible combination. This led to the truly difficult part of the study: The researchers in the organization would spend the next week trying to figure out exactly how to convey this information.

Works well with Web sites

This approach works extremely well with Web sites, as testing can take place using the actual behavior of visitors to the site, rather than asking people to provide ratings. This is how it works:

- Just as for print, the list of features to be varied is created.
- The variations are put into an experimental design.
- Alternative executions are made up.
- When people visit the site, they are randomly assigned to one of the alternatives.
- Clicks and/or stickiness (amount of time a

Figure 7

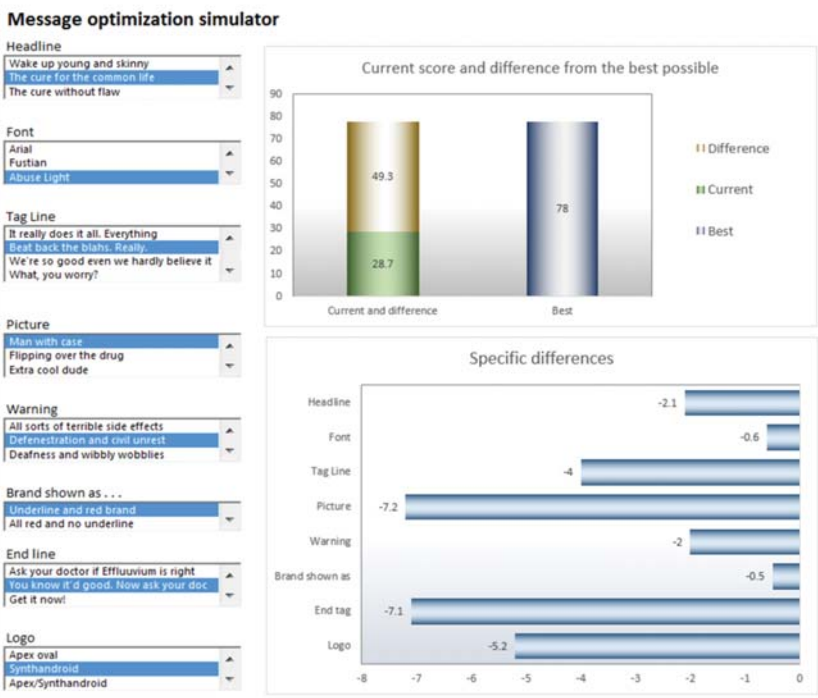


Figure 8

person spends on the page) get measured.

- With extreme values removed or rolled back to more reasonable levels, we solve for the target variable (clicks or stickiness).

Getting rid of extreme values is important – a person may appear to stay on a Web page for a long time for many reasons (answering the phone, doing several things at once, putting out a kitchen fire and so on). Also, vanishingly small times suggest a mistaken click on the site – and so likely are not a reflection of interest levels.

In Figure 8, we see how a fictionalized Web page with five elements being varied looks. (The superimposed numbers are there just for our reference – they would not appear in the test.)

We in fact have five elements, each varied in four ways. This comes to some 1,024 alternative combinations of the varied elements (or 4 x 4 x 4 x 4 x 4). To test the value of all possible combinations, we needed to develop and test 20 alternatives in an experimental design to get accurate measurements. (This again is based on the calculation of how many degrees of freedom we have in this design – namely 5 x 4 minus 5, then plus 2 to measure error and the constant. We used the next even multiple of 4 above this, or 20.)

Needing 20 alternatives leads to a caution: You need a fairly well-visited Web site to do behavior-based testing of this type. If each person sees just one of those alternatives, then that person is just 1/20 of a complete set – or that person counts as just 1/20 of a complete respondent.

Sticking with a fairly slender requirement of 125 complete respondents, we would need 2,500 visitors to complete one test. So you do need a relatively busy site to do this kind of testing.

This may seem to demand a great deal of traffic to get an answer – and if so, then nothing prevents you from testing the elements for a Web site in the same way as you would test a print advertisement. That is, you would recruit people to a survey and then show each person a number of alternative site designs. The live test has the advantage of measuring actual marketplace behavior – and presumably among people who are interested in the product or service. In the survey's favor, if we questioned people, we also could ask other questions about who the respondents are, their usage of other products, and so on.

Find the best mix of elements

We have outlined some of the useful ways in which conjoint analysis can find the best mix of elements in communications. No other method gives you nearly the same ability to determine the value of so many alternatives at one time – hundreds or even thousands in a single test.

We have just touched on the complexities that underlie this (which we suspect you will forgive). Fortunately, the area in which conjoint has received the most criticism – uncertainty about the way in which the utilities it produces actually become choices in the real world – does not matter as much when you are trying to pick the best combination of message elements. Because of this, conjoint stands as particularly well-suited toward testing communications of many types.

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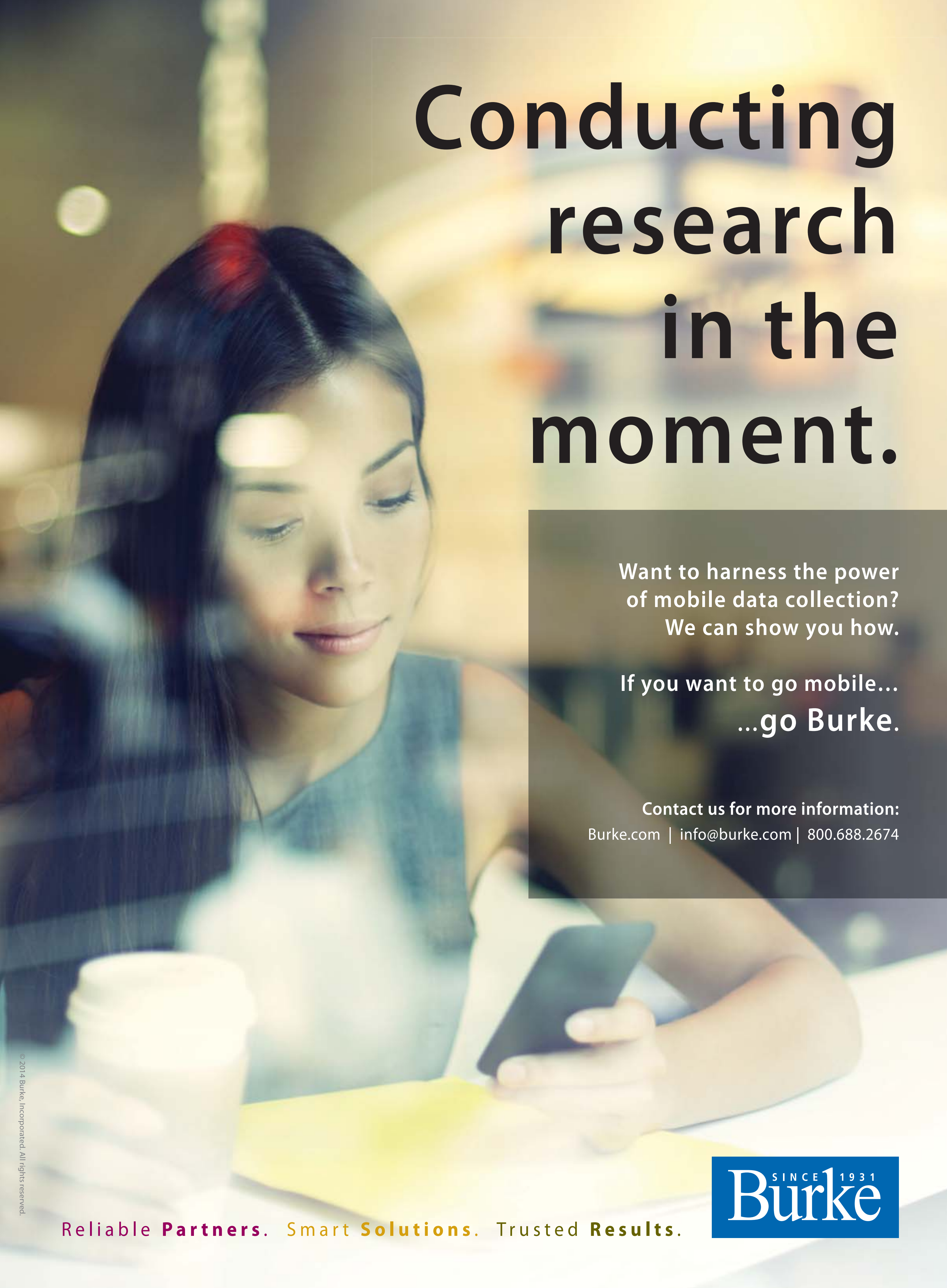
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case study

••• mobile research

That's the spot

How mobile qualitative research helped Mondelez Canada find the right aisle for Potato Thins

| By Steve August

snapshot

Findings from an in-store shopping exercise allowed Mondelez Canada to validate its own theories on where to stock a new savory snack line.

quirks.com/articles/2014/20140706

The snacking market is huge. Worldwide, it is worth $300 billion in revenue and is expected to exceed $380 billion by 2017[1]. It is driven by consumer trends, the biggest of which is healthy eating. Since 2004, the number of consumers categorized as healthy snackers has grown from 29 million to 41 million[2]. But the landscape is competitive, saturated with brands such as Special K.

With this, and the knowledge that the average size of U.S. grocery stores is declining[3] in mind, Mondelez Canada set out to launch Potato Thins – a low-calorie, baked, potato-based "cracker chip" savory snack – in the U.S. The Potato Thins are packaged in a resealable pouch, differentiating the product and allowing the consumer to consume small portions of the 115g bag at a time.

Mondelez Canada wanted to determine where its Potato Thins should be placed in a store. "After extensive research on our part, we had eight or nine potential areas in mind. We really needed to narrow this down and validate our own theories," says Rob McEvoy, shopper insights manager at Mondelez Canada.

A study was conducted by research agency Fresh Intelligence using FocusVision's digital qualitative platform Revelation Next. The platform facilitates research "in the moment" and provides a highly interactive interface, similar to social media – an environment this audience is comfortable with. It allowed participants to contribute their in-store experience as well as respond in real time to questions and tasks set by the research team.

Shoppers' logic and motivations

The key issue for Mondelez was to uncover shoppers' logic and motivations when it comes to in-store navigation and healthy snacking. So it chose to use mobile qualitative research, as it allows researchers to access consumer behaviors in-store, in the moment. This was important,

as when it comes to shopping and healthy snacking, decisions are often unconscious and profoundly irrational, meaning that shoppers are unable to identify different drivers when questioned. By accessing behaviors in-store as they happened, researchers could analyze the shoppers' decisions before they analyzed them themselves.

"We needed real in-store scope for this project. Humans are notoriously bad at recalling what they did five minutes ago, let alone what they did on their last grocery run," says McEvoy, adding that he feels a focus group or interview would have been less powerful because of their artificial constructions. "Connecting with consumers through mobile ensured the insight obtained was truly unobtrusive and genuine. As using mobile and interacting with it is a part of everyday life – 79 percent of adult smartphone users have their phones with them 22 hours a day – using a mobile app to communicate was natural for participants."

'Ground truth'

In military slang, "ground truth" describes the reality of a situation as opposed to what intelligence reports and mission plans assert that reality to be. In a research context, being on-location and in-person with consumers can be time-consuming and expensive, making it rare that researchers can truly establish ground truth. But smartphones and mobile qualitative research have changed that. We can now be there whenever and wherever key behaviors happen.

Here are five ways mobile qualitative can be used to access the ground truth of consumer behaviors:

Usage diaries. These focus on how a consumer interacts with a particular object: a phone, an appliance, food, etc. The data capture is around the moment of use – the what, when, where, why and specifics of the use. For example, a diary of a day at an amusement park is a usage diary on how the consumer is using the park.

Spotter diaries. This is about capturing people's encounters with things out in the world (brands, categories, advertising, etc.), to understand the presence of them in a person's life in context. An example of a spotter diary would be to have participants post a picture and a description of where they encountered Apple on a given day.

Process/purchase diaries. These focus on a single, significant purchase decision that evolves over time. When someone makes a big purchase decision, they go through a process: they do research, talk to their friends, see ads, go to stores. This path unfolds over time and you need the whole narrative to understand the behaviors.

Behavior diaries. These are open-ended explorations and focus on a topic. For example, a hair care diary could encompass tools, consumables and going to a salon or barber. The goal is to get the whole picture of consumer behaviors around the topic.

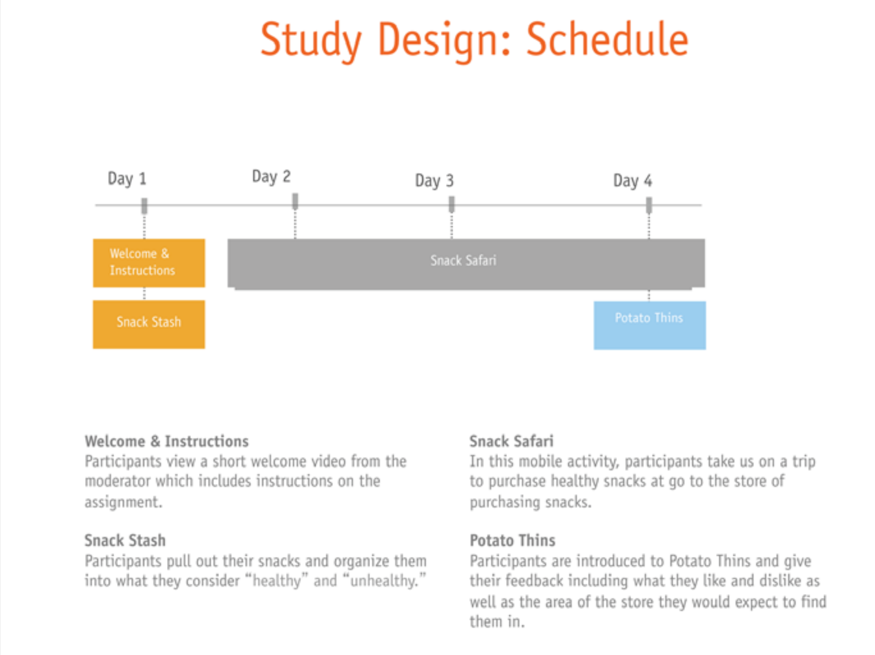
Mini documentaries. Having participants create a mini documentary is an effective way to capture something about themselves or a specific activity. This mini documentary activity is split into three video uploads. This keeps things focused and brief, which benefits participants, and researchers, in organizing the videos for reporting. This can be adapted for process and activities, environments, and "getting to know you" activities.

A community of shoppers

For the Mondelez project, the study unfolded over a period of five days, involved over 1,000 interactions and collected over 700 images. Figure 1 shows an outline of the study. The Revelation Next platform allowed researchers back in their offices to moderate a community of shoppers who could then partake in activities to help uncover a deeper understanding of logic and motivations.

While the technology and interface of mobile qual tools mimic what people expect out in the social Web, there are important differences in the context of the community that greatly impact how people engage. When people join social networks or forums on the Web it is because they are brought together by a commonality – whether it's an interest or a network of friends. However, participants in this study were strangers in an artificial environment with no pressing information or networking needs – and

Figure 1



they needed to be put at ease. So, we started with an opportunity for them to interact, tasking participants with introducing us to the "typical them," encouraging them to be comfortable with the app and interacting with it from the outset.

After welcoming and sharing a little about themselves, we wanted to identify what consumers define as healthy and unhealthy snacks, so the researchers asked participants to categorize them. Unsurprisingly, snacks which are overprocessed, high in fat, carbs, salt and sugar were considered unhealthy. But almost all participants recognized that there is a time and a place for these snacks, such as "in the evening," "when I have a craving for snacks" or "when watching a movie or sports." Healthy snacks were characterized as low in fat, sugar and salt; unprocessed; low in calories; with high nutritional value and gluten-free. Consumers said that healthy snacks are more likely to be consumed earlier in the day: "in the morning," "before or after exercise" or "as a substitute for cookies" but also to "kill" the craving for chocolate.

This activity helped Mondelez to understand what else falls into the baskets of those on the hunt for healthy snacks.

'Snack safari'

We then sent participants on a "snack safari," asking them to record their shops by taking photos on their mobile. During this

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(YOU PREDICTED THIS BEFORE THE $5MM ROLL OUT)

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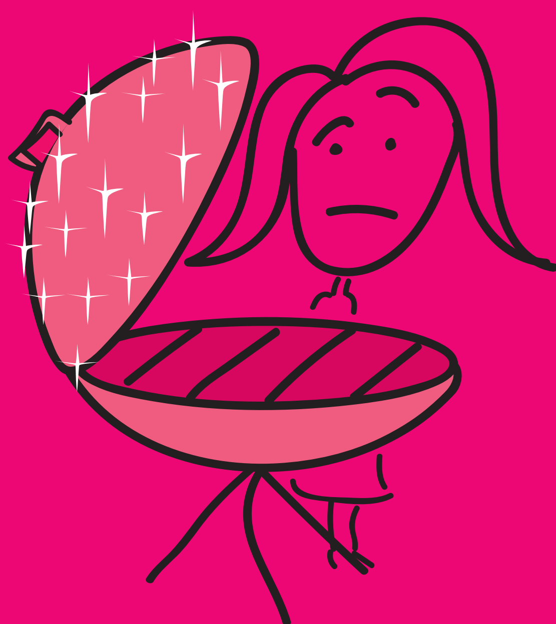

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exercise, consumers showed two distinct behaviors when shopping for snacks: They were either hunting or browsing.

When hunting, consumers tended to ignore signage, as they knew which aisles to head for. When browsing, participants went up and down the aisles of the store gathering the items they needed, also keeping an eye out for new items. This most often happened during a larger weekly shop. It was also more common in stores where healthy snacks are interspersed amongst regular snacks. One participant noted, “Unless I am visiting a grocery store with a single purchase in mind, I normally just go up and down all the aisles. However, if I’m trying to avoid the unhealthy snack options, I’ll just avoid the chip aisle and save myself from the temptation.” This demonstrated that the chip aisle would be a bad location for Potato Thins, as shoppers who were trying to be healthy avoided it altogether.

This activity also found that most stores do not have signage that indicates “natural” or “healthy” products but when they do, shoppers went to those sections when looking for healthy snacks.

Chip aisle or cracker aisle?

Only after sending participants on their snack safari did we introduce them to the Potato Thins product. We asked whether they thought it should be placed in the chip or cracker aisle and the majority of participants picked the cracker aisle. One participant said, “I could see them in the snack food area, close to the chips. However, I would likely miss purchasing them, as I tend to avoid going down that aisle as it’s too tempting and not healthy. So, I suppose that it would be better to merchandise them close to the crackers.” We also concluded that the bag may look out of place on the chip aisle due to its size. One participant said, “The size of the package is quite small, so if you wanted to serve these rather than regular chips you would have to purchase quite a number of packages.” A minority of participants thought that Potato Thins should be found in the chip aisle; others thought that they should be placed in either or in the snack aisle.

Best location

The study concluded that the cracker aisle was the best location for Potato Thins. This was not only because people actively avoided the chip aisle when looking for healthy snacks but also because the pouch packaging stood out among crackers and the small size didn’t feel as important when not being compared to giant chip bags.

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case study

••• mobile research

Where are we going with this?

Cisco leveraged quantitative research to explore U.S. enterprise mobility trends

| By Jay Shutter

snapshot

Cisco commissioned an online study to gain a better understanding of what's driving the need for enterprise mobility and BYOD and how IT organizations are delivering them.

Mobility and BYOD (bring your own device) are very real and very important to any business today – they are not just hype. For the less sophisticated business, mobility is fairly straightforward. Using a laptop and VPN to connect to a corporate network to access data (and e-mail) has been around for many years and is something even small companies can provide. Providing employees with anytime-anywhere access to e-mail and calendar on smart phones, tablets or through a browser has also become significantly easier because of the evolution of both e-mail and mobile platforms. However, as an organization grows and becomes more complex in terms of number of locations, employees and IT infrastructure, architecting and managing mobility and BYOD becomes more difficult and more critical. Business leaders and employees are demanding increased mobile access to applications and data and IT organizations must respond while at the same time keeping networks and data secure.

Figure 1

At its core, mobility and BYOD are ultimately about employee productivity and innovation and is being driven by the consumer-employee. Consumers, many of whom are enterprise employees, have embraced digital lifestyles. They all have PCs at home; they all have smartphones and tablets; many of them use video messaging services to talk to family and friends; and certainly all of them use text-messaging or other messaging solutions to communicate. With all of these capabilities available to the average consumer (employee), it is no wonder that they would expect their employer to provide the same types of services for them to do their jobs. The consumerization of IT is a real and meaningful phenomenon.

In light of this evolving work environment, San Jose, Calif., networking technology firm Cisco commissioned Illuminas to conduct in-depth research to gain a better understanding of what is driving the need for enterprise mobility and BYOD and how IT organizations are delivering it. Do organizations have a mobility strategy or are they just reacting to employee and organizational demands without any coherent plan in place? How far are organizations pushing mobility and anytime-anywhere access? Are they developing applications or making current applications available via mobile devices?

To address these questions and more, we worked closely with Cisco to develop an online quantitative survey that was conducted first in the U.S. and subsequently in key international countries selected to represent the European and emerging markets regions. The U.S. survey was approximately 25 minutes and was conducted among 400 IT decision-makers from a variety of industries. Only senior-level IT employees who are actively involved in decision-making for mobile devices, solutions and services were allowed entry into the survey. Since the focus of the study was on enterprise mobility, the vast majority of IT decision-makers surveyed were required to work for a company with 1,000 or more employees and over half of the organizations surveyed indicated having offices or branches in multiple countries around the world.

The research findings compiled here represent the U.S. results only.

Clear impact on implementation

The study revealed that 51 percent of organizations have an enterprise-wide mobility strategy in place with clearly defined initiatives, while 49 percent do not. Having a formal strategy in place has a clear impact on implementation, as the vast majority (63 percent) of those with a strategy say integrating mobility solutions is easy and straightforward, while just 43 percent of those without a strategy in place can say the same.

The primary mobility initiatives in place among enterprise organizations today are mobile security (78 percent), followed closely by mobile device management (65 percent) and VPN access (64 percent). Given these specific initiatives, it is no surprise that the primary focus of mobility today is on supporting employees rather than customers; almost all organizations surveyed are focusing on providing mobility solutions to their workforce (97 percent), while only 38 percent have mobile initiatives that support customers. With such a clear focus on employee mobility, it makes sense then that the top perceived benefits of mobility are increased productivity (72 percent), increased business efficiencies (70 percent) and cost savings (59 percent).

Limited to basic applications

While it is clear that organizations are focused on driving employee mobility initiatives, the functionalities being extended to mobile devices are still relatively limited to basic applications such as e-mail, calendar, intranet and collaboration applications. Much of the more sophisticated functionality employees have access to in the office or on their laptops (file server access, custom business applications, enterprise applications, unified communications, virtualized desktops, etc.) is still only offered via smartphone or tablet by a small percentage of enterprise organizations.

The lack of mobile support across more sophisticated enterprise applications may be due to form factor, in that many of these applications simply haven't been developed for mobile yet. While organizations surveyed indicated that 31 percent of their enterprise applications today have been adapted for mobile devices, this is expected to increase by over 30 percent in the next year as organization continue fueling their internal mobile initiatives.

Despite the evidence that many organizations are actively increasing their employee mobility solutions, these initiatives do not come without their challenges. By a wide margin, as shown in Figure 1, the chief concern of IT leaders across the country is managing security risks across mobile devices (64 percent). In fact, 44 percent of organizations say managing security risks is enough of a challenge to prevent them from moving forward with a mobility initiative. The other most-cited challenges of employee mobility include increased IT infrastructure costs (49 percent) and challenges associated with delivering a secure, consistent experience across devices (46 percent).

Include customers in future strategies

While only 38 percent of enterprise organizations are currently supporting customers with mobility initiatives, the benefits of doing so may compel more organizations to include customers in their future mobility strategies.

Today, those supporting customer mobility are primarily focused on building relationships: using mobile solutions to drive increased customer satisfaction (76 percent) and customer loyalty (73 percent) and to improve brand recognition (66 percent). Less than half (44 percent) of enterprise organizations who currently support customer mobility are doing so to encourage purchases but almost all (85 percent) plan to implement functionality that will enable sales in the future.

Just as security is the No. 1 challenge for employee mobility, 68 percent of those currently supporting customer mobility recognize that protecting and securing their customer data is their primary concern. Despite these security concerns, supporting customer-centric mobility initiatives is seen as key to business success as the majority of organizations with a customer mobile strategy believe supporting their customers' devices and delivering mobile applications to customers is important (72 percent and 80 percent, respectively).

Provide the best tools

From the organizational perspective, collaboration and communication tools continue to evolve, as does the organizational approach to collaboration. More and more organizations will embrace video and messaging collaboration and in turn make those tools available to employees from any location and on any device. In order to attract and retain the best talent, organizations are recognizing the need to provide the best productivity and collaboration tools as well as the flexible work policies that are needed in today's market. With all of these forces converging, the mobility of applications, data and resources (phone, video, etc.) will become more and more important to the organization and more and more complicated to manage and secure.

We believe that in five years' time, the enterprise information worker will have a virtual office space (PC, phone, video, etc.) that will be available to them anytime, anywhere and on any device (device limitations not withstanding). Improvements in public infrastructure will significantly improve bandwidth and reduce latency issues for mobility. The net effect for businesses will be increased employee productivity and satisfaction and for those organizations that harness mobility and collaboration for innovation, increased growth, revenue and profitability.

Seamless and efficient connections

Five years on, enterprise mobility will of course impact customers in a more significant way. Whether on a mobile device in the retail location or on a mobile device anywhere, customers will have more seamless and efficient connections directly to enterprise organizations – connections that create a whole new level of relationship with the customer. Organizations (business, government, education, non-profit, etc.) will be able to not only deliver customer service at a whole new level (think video chat and mobile access to experts) but, through the power of big data and the Internet of Everything, will be able to anticipate customer needs. All of these abilities to strengthen and improve customer relationships will be driven by mobility, whether we are talking about data mobility, employee mobility or the ability to leverage mobile technology to connect directly to customers on their mobile devices.

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●●● shopper insights

Bending the streams of big data

Shopper marketing in 2020

| By Sarah Gleason

snapshot

Sarah Gleason looks at the evolving nature of the shopper marketing function and outlines a future filled with challenges and opportunities.

Shopper marketing (SM) has come a long way. Just a few years ago, it was a little-understood task driven by promotions or channel marketing and focused primarily on trade. Today, 77 percent of CPG companies and retailers have a dedicated shopper marketing function and there is an increasing view that shopper insights are strategically essential.

But technology continues to transform the shopping experience and consumer expectations. GfK research shows that over one-third of U.S. shoppers now use both online and offline sources of information when making purchase decisions. And the proliferation of online researching and shopping – via a variety of devices – has created a host of big-data information streams that can drive new insights on shopper behaviors. This richness presents big opportunities and equally big challenges to shopper pros.

So where will shopper marketing be in 2020? Having come so far so quickly, what frontiers will it conquer next? Might it even disappear completely, absorbed into new, digitally-focused brand and data management roles?

GfK recently spoke to over 50 shopper marketing professionals in 40 companies, revisiting an important series of issues first measured in FutureScope 2006. (Executed annually since 2006, the GfK FutureScope benchmarking study gathers perspectives from shopper marketing professionals in a broad range of categories, from food/beverage to consumer electronics.) The new data show that shopper marketing is now taken more seriously, has a broader purview and plays a bigger role in marketing and retailer account planning decisions. But its future is contingent on a still-evolving set of company and category needs, analytical skills, and digital data sources.

More strategic than tactical?

An important change has been the emerging perception that shopper marketing is more strategic than tactical, driven by investment in robust and revealing shopper

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Figure 1

insights. One in five shopper marketers now says that his or her organization views SM as "highly strategic" – an impressive proportion for a function once viewed as almost purely tactical. Senior management is now more likely to see insight-driven shopper marketing as a necessity for guiding successful brands, rather than a "bolt-on" with narrow applications.

The shopper professional's ability to synthesize and imbed insights that drive business at retail has been key to this shift. Becoming valued but humble team members, shopper marketers have learned to add their particular brand of consumer intelligence to the decision mix, particularly as it relates to shopping behavior (Figure 1). They have become better collaborators, earning the support of senior management and being viewed as a lever to accelerate revenue and strengthen crucial retailer relationships.

In addition, shopper marketers are valued for decision-making because they understand and encourage the links between brand marketing and sales, specifically the retailer's objectives. Shopper marketers live partly in the global brand world and partly at the local level – where in-store activities play out and help determine the fates of products, categories and stores. Shopper pros can mediate between the goals of brands and chains, bringing retailer considerations into decision discussions early on, while staying focused on big ideas that can impact shopper behavior at a national (or even global) level.

Shopper marketers also often partner with other departments in bringing marketing initiatives to the mobile devices that are upscale consumers' favorite researching and shopping tools. The very nature of the SM role means shopper pros need to stay up to speed on how shoppers are using these devices and the best ways to leverage them to impact shopper behavior – without becoming an intrusive presence.

Grow their role

So where are all these very positive trends leading? What will savvy shopper marketers need to know in 2020 and how will they continue to grow their role in the marketing organization?

First, as the shopping process becomes more complex, we see the need for dedicated shopper marketing and insights resources growing – not being absorbed into other functions, Whether on Web shopping sites or in brick-and-mortar stores, the shopper's experience and wishes will remain essential to understand, for brands and retailers alike. In addition, the need to bridge the gap be-

Figure 2

tween corporate priorities and field-level retailer needs will continue.

If anything, stores will become more locally oriented to leverage their special advantage as a neighbor and in-person advisor – a valuable differentiator from anonymous online shopping sites. At the same time, retailers must offer a seamless experience for shoppers between on and offline, so as to complete the conversion of a sale. Brands will also need to key into these movements, supporting them through a variety of efforts and also advancing their own sales agenda in the process. Shopper marketers will bring on-the-ground expertise to make all of this happen.

Fully half (49 percent) of shopper marketers in the FutureScope survey said they expect their roles to change in the coming 12 to 18 months (Figure 2). What will be added? Not surprisingly, digital/mobile shopper marketing (44 percent) and e-tailing/e-commerce (40 percent) top the list, trailed distantly by answers like "channel marketing and innovation" (16 percent) and even packaging (4 percent).

A recurring theme in our look at the future of shopper marketing is "turning insights into activation." At one level, this means pure data integration; there has been a massive investment in insights along the path to purchase but the information is often siloed and rarely brought together with any sophistication. All key constituents know big data is everywhere but they need help tapping into the streams and making them answer relevant, decision-changing questions. Shopper marketers hold the key.

When asked who is responsible for turning insights to actions in their companies at the total business level, 63 percent of shopper marketers said that role falls to them. At the brand level, still more than half (53 percent) saw themselves as tops – more than double the percentage for any other job role. We see this immersion in data activation – and into in-market strategies and solutions – only growing and even expanding to related areas.

Making this activation happen requires not just data expertise but the shopper professional's newly honed collaborative skill. As one shopper marketer said to us, "Internal in-fighting between consumer and shopper researchers needs to stop so we can get better at data integration." In the coming years, shopper marketers will find themselves called on more and more to act not just as team members but as conductors of the shopper and retailer insights "orchestra," as hubs at the center of so many valuable but unmediated data sources.

Mass personalization

One area where big data will become increasingly important, and where shopper marketers will be at the center of the action, is mass personalization. The next five to 10 years will bring a huge shift to the personalization of shopper messaging on mobile devices. Targeted offers based on shopper loyalty card data – and delivered directly to smartphones and other devices – will become common; location meta-data will also play a big role. Shoppers are already comfortable ordering groceries online and the use of mobile wallet applications is winning converts. By personalizing the mobile commerce experience further, marketers can tap into its inherent intimacy – and wealth of information.

Of course, this will create another avenue for collaboration between brands and stores, a natural extension of the shopper marketer's role. As one shopper insights pro put it, "Retailers and manufacturers need to partner to develop winning mobile strategies that drive shopper engagement and loyalty."

Not surprisingly, we will also see the shopper marketer's skill set continue to evolve. In fact, no one person will be able to deliver on all the areas where SM will need to play. From strategic thinking to advanced analytics to capturing cross-functional synergies, shopper marketers will need to expand their own knowledge and seek out expertise in others – IT pros, data visualization designers and folks from other disciplines they might never have worked with in the past.

Perhaps most important, the shopper marketer of 2020 will need to be comfortable in leadership roles. In many circumstances, he or she will begin to command the same authority as a brand manager and even a CMO. Instead of just delivering one piece of the puzzle, the shopper professional may be in charge of putting the puzzle together from many corners of the company.

Sit at the center

With digital shopping and marketing colliding at extraordinary speed, remaking the marketer's role almost monthly, shopper marketers are poised to sit at the center of this continuing change – if they will step outside their comfort zones and accept the mantle of insights leader, not just highly specialized expert. Regardless, the next 15 years will be truly transformative for the SM community and for its collaborators throughout the organization.

Sarah Gleason is senior vice president in shopper and retail strategy at GfK. She can be reached at sarah.gleason@gfk.com.

The new **Enhanced-Wireless™** sample from Scientific Telephone Samples (STS) provides researchers with the powerful ability to directly target cellular/wireless individuals and wireless only households. Based upon a very large database of known wireless phones, along with the corresponding names and addresses, this new type of wireless sample is an industry first. Results in the field show high hit-rates on ZIP code, excellent sample efficiency, and significantly increased production rates. STS **Enhanced-Wireless™** samples are also unique in that they can be targeted by demographics as well -- such as age, gender, ethnicity, and income.

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••• shopper insights

Seasonal marketing in a social age

How consumer feedback can change what you know about seasonal buying patterns

| By Amy Hayes

snapshot

Analysis of online consumer reviews uncovers patterns in shopping behavior and in the timing of when shoppers start gathering information for their upcoming purchases.

"Seasonality" is a powerful word. The regular and predictable changes that recur every year affect everything from animal migrations to fluctuations in the financial markets and, yes, the buying patterns of consumers around the world. For decades, marketers – always attentive to any trend that can help maximize sales – have used purchase data to methodically plan campaigns around holidays, vacation schedules and even television programming.

As it turns out, though, analyzing the historical ups and downs of sales data means that many marketers are likely getting only part of the story. It's one thing to know when a shopper pulled out his or her credit card but what if you could know when they actually start evaluating what products to buy and what features they care about most? What if you could see how consumers form new shopping habits during peak shopping seasons that create new opportunities for you to engage them throughout the year?

The Conversation Index Volume 7, the latest issue of Bazaarvoice's semi-annual research series, reveals that online customer conversations expose a great deal about shoppers' seasonal purchasing behaviors. Based on an analysis of sample data from the Bazaarvoice network, including more than 57 million reviews and upwards of 35 billion product page views, the findings indicate a number of strategies that retailers and brands can employ to capitalize on seasonal trends and maximize sales.

Make-or-break sales period

Around the world, November and December mark the busiest shopping time of the year and a make-or-break sales period for retailers and brands. With holiday gift-giving on the minds of millions of consumers, it should come as no surprise that these two months consistently see more consumers interact more often with online reviews than at any other time of the year.

What may be more of a surprise, though, is how closely the spike in review usage during

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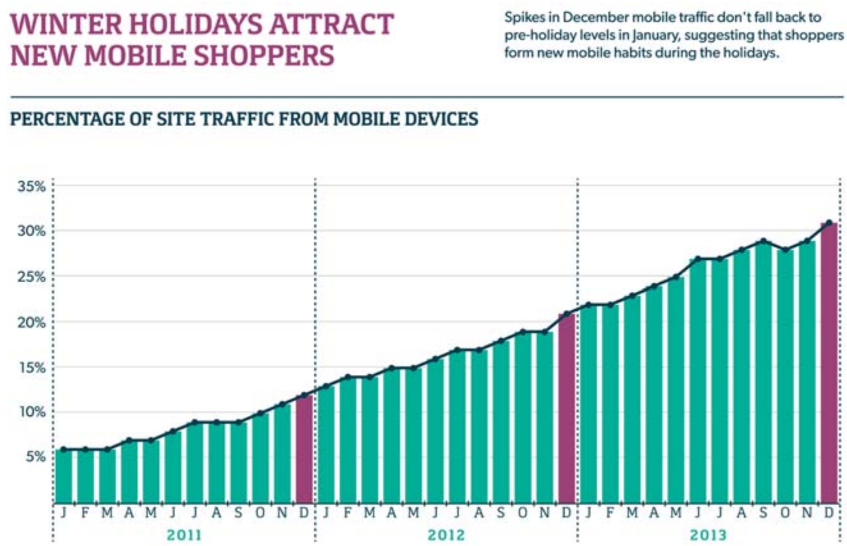
Figure 1



the holiday season parallels holiday sales. According to the Census Bureau of the U.S. Department of Commerce, U.S. e-commerce sales for the fourth quarter of 2013 totaled an estimated $83.7 billion – a 39 percent increase from the average of e-commerce sales during Q1-Q3 2013. In parallel, review page views for November and December exceeded the monthly average for the rest of the year by 38 percent and 48 percent, respectively.

Drilling down further, data from comScore shows online spending on Black Friday and Cyber Monday reached $1.2 billion and $1.7 billion, respectively – increases of 169 percent and 239 percent over the daily e-commerce average for the first 29 days of November 2013. Likewise, Black Friday and Cyber Monday were the most review-trafficked days of the year, beating the November daily average for review page views by 77 percent and 84 percent, respectively.

Looking internationally, most countries mirror the U.S. in that review usage is highest in November and December, as consumers are researching and buying gifts in preparation for the holidays. However, while Black Friday and Cyber Monday are the most review-trafficked days of the year globally, it may come as a surprise that both days are outperformed by Boxing Day – a bank holiday that generally takes place on December 26th – in the countries that celebrate it.

Similar to Black Friday in the U.S., Boxing Day shoppers rely heavily on consumer feedback to guide their purchase decisions. Across the U.K., Canada, Australia, Hong Kong and South Africa, review page views maintained a relatively steady average of approximately 20 million per day from June-September 2013 before climbing to approximately 30 million per day between October and November. Review page views spiked further – to nearly 40 million on Black Friday and Cyber Monday – and reached a peak of nearly 45 million on Boxing Day. Given the consistent growth in the lead-up to Boxing Day, it may come as no surprise that the IMRG Capgemini e-Retail Sales Index shows that U.K. online retail sales in December recorded 18 percent year-on-year growth as British shoppers spent £11 billion online, while data from Experian Hitwise shows that Boxing Day 2013 was the biggest and busiest day ever for online retailers in the U.K.

While analyzing consumers' interaction with online reviews can help predict the relative strength of the holiday season from a sales perspective, understanding how consumers interact with reviews can provide clues to engage with them throughout the rest of the year. In particular, mobile traffic to review pages consistently jumps from October to December, then continues to grow – albeit at a more moderate pace – after the new year. The data suggests that many people try mobile shopping for the first time during the holiday season and then become mobile shoppers for life – making the holidays an excellent time to win their mobile loyalty (Figure 1).

Moreover, while people are still less likely in general to buy or read reviews via mobile, data shows that the impact of reviews on mobile shoppers is much greater than it is on desktop shoppers. In a desktop-computing environment, review readers are 66 percent more likely to buy than consumers who don't read reviews. On mobile, however, review readers are 127 percent more likely to buy. With nearly double the impact on conversion versus desktop shoppers, reviews should be an essential part of an effective mobile experience.

The back-to-school shopping season

The back-to-school season varies from one country to another but often is viewed by retailers as an opportunity to boost sales during those months when consumers trade trips to the mall for a trip to the beach. In the U.S., the back-to-school shopping season is second only to the end-of-year holidays and retailers and brands in the consumer electronics and office supplies industries ramp up their campaigns accordingly. But do they do it early enough? Data from the 2013 season shows that, if they heeded market research and traditional back-to-school shopping assumptions, they may not have.

Market studies last year asked people when they planned to do their back-to-school research, and respondents indicated that research would peak in mid- to late-July.[1] However, Web data from customer-written reviews and product questions and answers across consumer electronics and office supplies show differently. In fact, shoppers started researching back-to-school purchases as early as mid-June – approximately the same time as the end of the school year for many students across the U.S. And research peaked in the first week of July – weeks earlier than consumer surveys predicted. The upshot? U.S. retailers who ran back-to-school campaigns stocked with consumer reviews were best prepared to earn shoppers' sales during the 2013 back-to-school season. Visitors to consumer electronics or office supplier product pages were 37 percent more likely to buy if they interacted with reviews and revenue per visit in these industries increased 28 percent and 48 percent, respectively.

Internationally, back-to-school research more closely matches predictable patterns. For example, students in Australia attend school for 200 days per year from late January to mid-December. Back-to-school research peaks in January, with most Australians accessing consumer reviews and product questions and answers just prior to the commencement of the school year. Similarly, most schools in Japan run on a trimester schedule. The academic year begins in April and ends the following March, with breaks for summer, winter and spring to separate the three terms. Unsurprisingly, Japanese consumers do most of their electronics and office supply research in April. Further reinforcing the rise in research, April also marks a time of year where many professionals traditionally make career changes and precedes the "summer bonus" season when spending increases and many Japanese retailers offer special discounts.

How retailers and brands can make the most of holiday shopping

To draw in customers during the most heavily shopped days of the year, retailers and brands should:

Prominently display reviews for their predicted holiday bestsellers, such as providing a "top rated" gift list online and in marketing content.

Consider a product sampling program to load up review volume before the holiday shopping season kicks off.

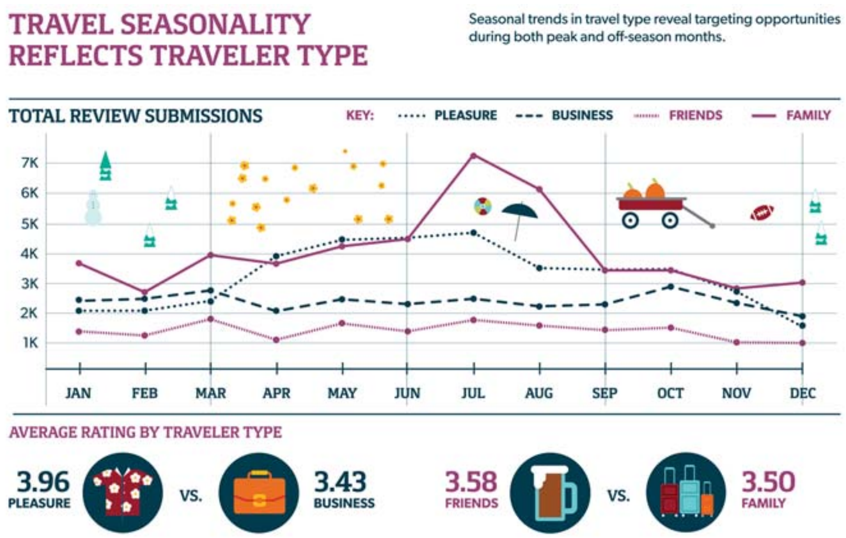
Lock down an excellent mobile experience before the holidays and heavily promote your mobile site or app in store signage and advertising, to capture first-time mobile shoppers for life.

Data suggests that gift-givers leave reviews on retailers' sites, while receivers leave reviews on manufacturers' sites. To collect a high volume of reviews that support sales after the holiday period:

Retailers: Use post-purchase e-mails to invite gift-givers to review their gift and use inserts in store gift bags or requests on gift receipts to attract gift recipients to submit their reviews.

Manufacturers: Include a request for reviews on your product packaging, in post-holiday ads or on warranty registration cards and Web sites.

Figure 2



Travel is next on the list

Following the end-of-year holidays and back-to-school season, travel is often next on the list of many consumers' main outlets for discretionary spending. Travel and tourism represents one of the world's largest industries and, according to the United Nations World Tourism Organization, travelers worldwide spent an estimated $1.2 trillion in 2013[2] on accommodations, food and drink, entertainment, shopping and other services and goods. The average travel review on the Bazaarvoice network is 60 percent longer than reviews for all other categories.

Travel reviews are also highly seasonal, with submissions skewed heavily toward June, July and August (Figure 2). That's to be expected but, following the trends, we see that some sorts of travel are more seasonal than others. For example, review submission data shows that pleasure travel booms in April and stays high through September, dropping off from October-March. Family travel shows a sharper spike between June and August, when the kids are out of school.

Analysis of the review text shows that positive reviews from all types of travelers most often mention the destination's location, breakfast and the friendliness of the staff. However, seasonal trends reveal when to target different types of travelers and what amenities should receive special attention to avoid negative feedback:

- Target your marketing messages to families and pleasure travelers in the peak season from April-September and look for opportunities to improve areas that most often cause these travelers to write negative reviews: water temperature and pressure; small rooms and pool; cigarette smoke; and street noise.
- Switch your marketing focus to friends and business travelers in the off-peak times from October-March. Hoteliers that cater to business travelers should emphasize high-quality Internet service and fitness rooms, while travelers with friends are sensitive to the quality of the sofa bed, A/C and bathrooms.

Drive full-margin sales

Seasonality plays an important role in marketing for any company but a better understanding of when you can best engage consumers may pay off in ways beyond just grabbing their attention. Consider that, as the holiday shopping calendar ticks closer to Christmas day, companies increasingly boost discount offers and run free shipping promotions, followed by clearance prices in the days and weeks after December 25. Leveraging the data in reviews to charge-up off-season shopping can help promote business during those periods when sales are less common, helping to drive full-margin sales. And, as the data clearly shows, an emphasis on reviews helps maximize efforts for those times of the year when you know things are about to pick up.

Companies around the globe are using the consumer feedback in online reviews to inform their business operations, from identifying ways to improve customer service to discovering the product refinements that can promote brand loyalty. Any company that is capturing online reviews should be analyzing them to understand the what and why behind consumers' experiences with the brand's products and services. But reviews can also help illuminate the when and how trends in online shopping and can be a key to success when targeting new markets – and winning new customers year round.

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tracking studies

Asking more of the data

Thoughts on how to add a strategic layer to tracking studies

| By James Rohde

snapshot

We love our tracking studies but James Rohde argues that there are ways to improve their ability to do more than just track.

Tracking studies have a problem. They are designed to measure changes yet offer little agility to focus on changes once they occur. As a result, far too many people are familiar with findings like: "Things are better than last year but little else has changed so we don't know why." Which is better than the alternative: "Things are worse than last year but little else has changed so we don't know why."

One of the contributing issues is that nearly all of the information reported from tracking is based off a direct question and answer from respondents, such as "Where have you shopped in the past four weeks?"

While we use a variety of tracking studies at MARC USA, we are rarely asked for a base rate of visitation or satisfaction for any brand. Instead, clients are asking for strategies. Most of our clients have a well-established history with their customers and often an established line of tracking research that is already in place. This means overhauling the research plan is not usually an option.

So, how do you find a new strategy using the same data? From the analytical standpoint, the initial roadblock is that tracking studies don't often inspire the critical question until AFTER the results are tallied. So if we stick to simply reporting data collected through direct respondent questioning there will be very little strategic insight.

Thankfully, tracking studies provide a lot more than the answers provided from direct questions.

The solution starts with correcting this article's first statement: Tracking studies do not have a problem; they are meant to provide context and lots of it.

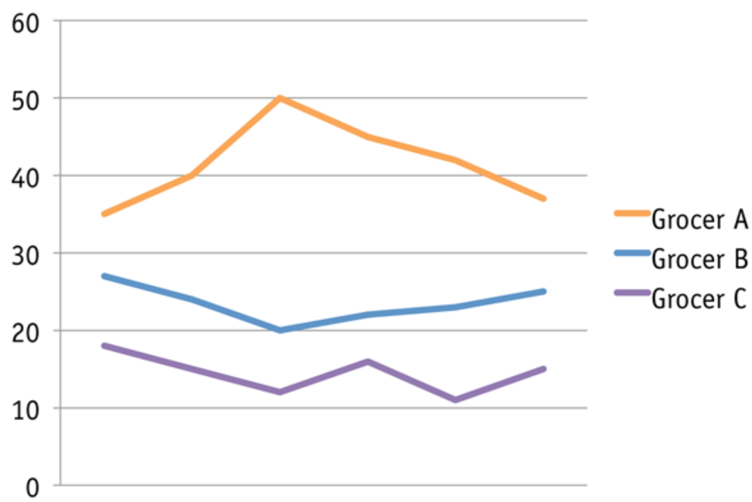
With such a wide range of market changes that any one tracking study needs to monitor, the scope of possible analysis can be daunting. Given that it is just not realistic to look at all possible combinations of data to find our answers, the real challenge is focusing the analytical scope on what is important.

quirks.com/articles/2014/20140710

Shoppers
Q: Where have you shopped for groceries in the past 4 weeks?

	2012.1	2012.2	2013.1	2013.2	2014.1
Grocer A	35%	50%	45%	42%	37%
Grocer B	27%	20%	22%	23%	25%
Grocer C	18%	12%	16%	11%	15%
Drugstore D	29%	35%	37%	33%	30%
Drugstore E	10%	15%	16%	14%	12%

Figure 1



So, how do we narrow the analytical scope in a systematic way? Following is a case that highlights a foundational analysis to narrow the analytical focus but still provide a deeper analysis within the broad topic of "brand."

The concept of narrowing down the scope of a topic to focus on key issues is hardly a new idea. Nearly every researcher on the planet does something similar when it comes to basic survey design. There are always foundational questions to help narrow the focus for the respondent, for example:

Q1) Where have you shopped for ___________ in the past 4 weeks?
Brand A
Brand B
Brand C
...etc.

It's an important question that is not just common but a necessity for the study to continue; we need to keep the impending attributes in the context of the brand. Yet, while the question is used to narrow the focus for the respondent, it is usually little more than a footnote during the analysis.

So now, in order to add some strategic direction, we have lists of attributes, designed to track perception, that we are forced to burden with the task of creating differentiation. Unfortunately, few brands exist on levels of such overt consumer awareness that the unique positioning of the brand consistently translates to unique perceptual ratings – hence, competitive sets.

It's not that brands are not offering their own unique strengths; it's just that looking at the highest brand level does not typically add the level of insight that can influence the tactical strategies that are already in place.

However, by maximizing the use of the information, we can zero-in and add context to the most critical brand interactions. This exercise assumes that your study has some base quality controls in place. For example, that your sample is robust; reflective of the people you are interested in; consistently defined across iterations; and the general methodology is not drastically altered wave to wave.

The data on grocery shopping habits shown in the table is meant to simply illustrate the process and is not real data.

This has a habit of looking something like Figure 1.

We can tell that since our last iteration: fewer people are shopping at Grocer A; more people are shopping at Grocer B; more people are shopping at Grocer C. Certainly important information but it tells us little more about our brand that the finance department would not have reported – and likely reported more accurately. The chart shows us where people shopped but nothing about the relationship between the brands; in other words, all we see is how many people checked the box.

However, leveraging the data from this same question, we have the ability to add the required context to take our understanding of the market to the next level. We have to leverage the fact that our results are measured in the context of an individual, not just the dollars spent. So when looking at the number of people who shopped Grocer A, it is important to see what that means in the context of both Grocers B and C, as shown in Figure 2.

Now we have leveraged the information in a way that is unique to the perspective of the customer's remembered history and important to how we understand the overall tactical strategy. Understanding the degree to which people are interacting with the various brands is something that gives us a bit more depth into understanding our current environment.

If we went no further, we could do some basic profiling to get a feel for who is being reached within the brands and how they differ. It is possible that there could be something here to help us define some new strategies although we still don't have enough to do anything within the context of the strategies that are already in place.

The next step is to understand more about not just how the brands overlap but how that interaction is changing.

For the sake of argument, let's compare the last two time periods of our study by looking at Figure 2 and Figure 3.

The goal is to determine who is interacting with whom and shed light on the changes. At first glance we can note the following: fewer people are shopping at Grocer A; more people are shopping at Grocer B; more people are shopping at Grocer C; more people are shopping both Grocer A

Figure 2

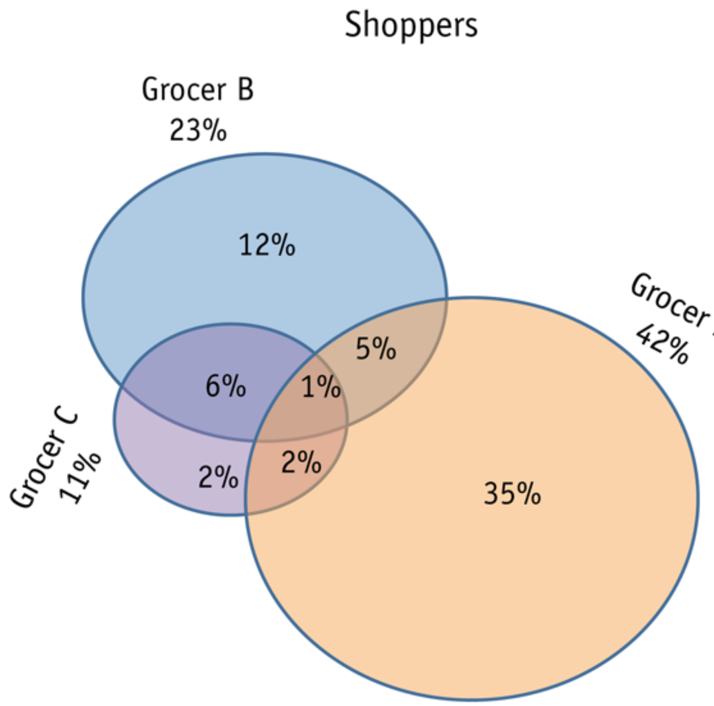
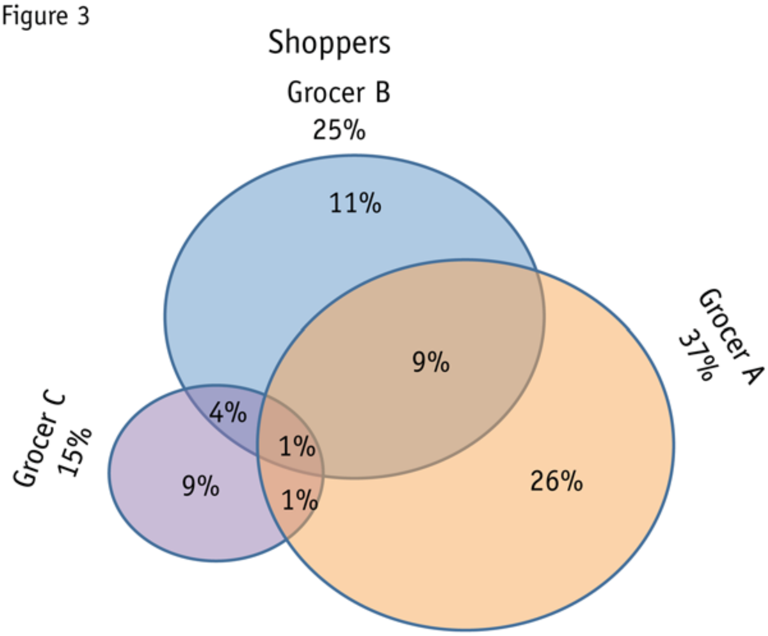


Figure 3



and Grocer B; fewer Grocer C shoppers are shopping other grocers.

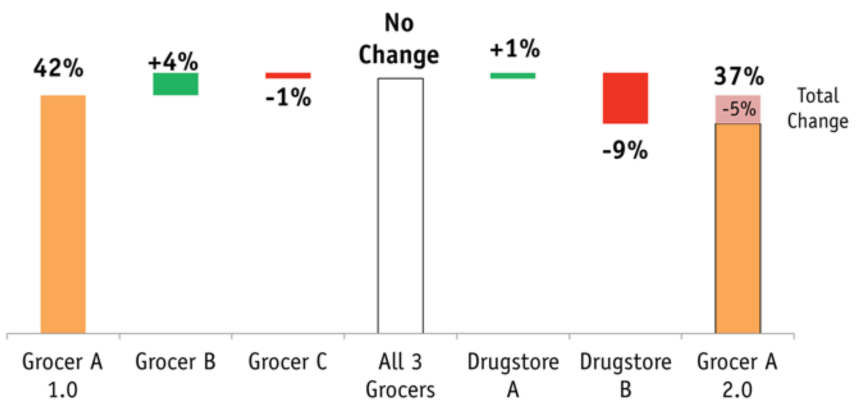
Again we have added a new dimension and see that in addition to profiling the static overlaps there is something to be found in identifying how those profiles may have changed. There has clearly been movement.

Of course, it's not just the overlaps themselves that are changing but also the size of the circles. So not only do we have movement between the grocer brands but also a more general shift in the number of people shopping any grocer.

This means we also have to expand our look to include brands outside just grocers over the same period.

While some could be tempted to start the process of a five-set Venn diagram, in practice this ends up being a difficult chart to understand (not to mention build). Instead, if we focus on each individual brand to understand

Figure 4



the dynamics, there is a greater chance we will be able to articulate what has changed over our given period.

Let's start with Grocer A as an example (Figure 4). Using a waterfall chart we are able to demonstrate the movements between brands over our two time periods. This offers a bit more context to the total number of consumers shopping our brands. Now we can add: fewer are shopping Grocer A than in the prior wave; more people are shopping both Grocers A and B than in the prior wave; Grocer A is sharing slightly more shoppers with Drugstore A; Grocer A is sharing fewer shoppers with Drugstore B.

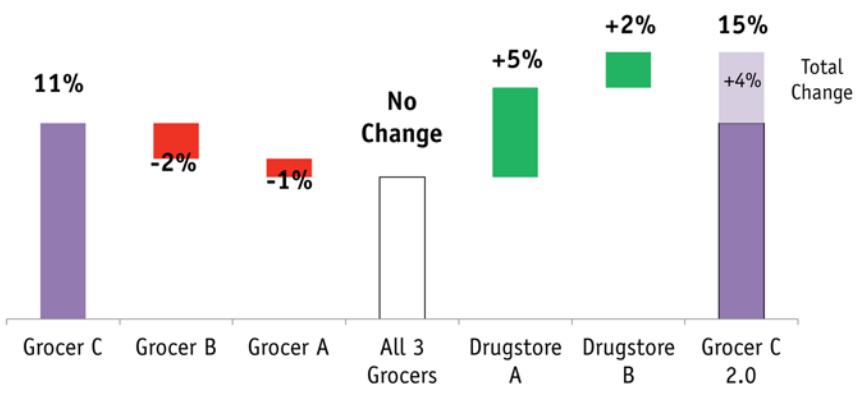
Given that the number of people shopping Grocer A is down, we can say that people are moving away from Grocer A and spending with competitors; specifically, Drugstore B. So while we knew that fewer people were shopping Grocer A, we also know that Grocer A has started sharing more customers with other grocers and has not been competing as strongly for shoppers from Drugstore B.

To be clear, all we are doing is using the data collected in asking people where they have shopped in the past four weeks. We are comparing those responses to the results of the same question from the previous wave. However, instead of showing two static snapshots, the focus is placed on the changes that took place between a single brand and the remaining competitors.

Let's try Grocer C (Figure 5). Again, some of the information in the waterfall chart is data that we see in the Venn diagram; however, we are able to more clearly specify the shifts between the two time periods: more people are shopping Grocer C; fewer Grocer C shoppers are shopping other grocers; more Grocer C shoppers are coming from Drugstore A; more shoppers are coming from Drugstore B.

By focusing strictly on the chang-

Figure 5



es between the time periods, we see not only that more people started shopping Grocer C but that they have been competing less with grocers and more with drugstores.

In and of itself, this helps to determine who your dollars are coming from and the extent to which they interact within the total space. We are now able to understand not just when a brand is growing or shrinking but where that fluctuation is coming from or going.

At this stage, we know that Grocer C is pulling shoppers from drugstores while Grocer A is starting to lose out to Drugstore B, even while pulling consumers away from Grocer B.

The next question is why. However, this is a much more direct question than it was when we started.

As opposed to a blank slate, we know the interaction that we are trying to explain and have a vehicle to identify the consumers demonstrating the behavior we would like to replicate.

That said, there is still a lot that could be layered on top of this to make it even more powerful if you have the data to do it. For example, if you have any data about the dollars spent at each brand in the past month, all these numbers can be weighted to reflect shifts in spend.

Identify the areas of opportunity

The point of this exercise is to begin to identify the areas of opportunity as they exist in the context being used to measure your brand. In any tracking study there are points that need to be fully explored and there are points that just need updates from the last iteration.

A successful tracking iteration differentiates the two and allows the brand to evolve, even when its not quite time to evolve the study.

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What is 'mobile research' anyway?

Embracing the next technological paradigm shift

| By Jon Sadow

snapshot

Google Consumer Surveys' Jon Sadow urges researchers to rethink their ideas around and definition of mobile research, to avoid repeating the kind of foot-dragging that accompanied the advent of online research.

For the second time in as many decades, the market research industry has an opportunity to lead organizations in a time of transformation. The growing pervasiveness of mobile devices presents client researchers and their supplier partners with advantages in scale, speed, cost and quality. These will not only transform how research is conducted but how it is valued. If researchers embrace this opportunity, they can expedite decision-making, introduce powerful new data streams and scale their knowledgebases to help drive marketing, sales and product development. Yet, there is a precedent of resistance to change within the industry that must be overcome in order for researchers to really be mobile innovators.

Learning from history

About 15 years ago, a major change began in the market research industry. The movement of research practices online would soon transform how data was analyzed. Researchers were just beginning to consider the possibilities presented by interactive online surveys hosted on the World Wide Web.

The next decade would bring with it an endless series of investigations into the value – and limitations – of online research practices. The discussion began as early as 1996, when Ravi Iyer wrote about "The Internet: A new opportunity for marketing research firms" in *Quirk's*. By 2001, *Quirk's* and publications such as *Marketing Research* were running articles like "Can we trust the data of online research?"[1] that dissected the advantages and disadvantages of the "online frontier." In 2005, *Internet Research* – nearly 14 years after it published its first volume – was still publishing pieces like "The value of online surveys,"[2] that debated the merits of Web-based research.

Consider that from 1997 to 2005 the number of Web users grew from 70 million to well over 1 billion. By 2003, U.S. e-commerce sales had soared over $100 billion annually, growing a rate of more than 40 percent from the previous year.[3] By the mid 2000s,

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in spite of the fact that businesses of all sizes were building out profitable online segments, the research community continued debating the same topics as the years before.

Meanwhile, the research industry lagged behind. Researchers were reluctant about, and perhaps afraid of, change. As a result, most research continued to live offline well into the late 2000s, despite the growing adoption of the Internet.

Another technology-driven transformation

Today, the industry is in the midst of another technology-driven transformation in the form of the widespread adoption of Internet-connected mobile devices. With mobile, the industry has another opportunity to innovate. The reality, however, is that the adoption of new, mobile research practices is like déja vu for many industry veterans. In 2013, the fourth or fifth consecutive "Year of Mobile," only 27 percent of researchers conducted mobile surveys at all.[4] This figure is actually generous, as it factors in the percentage of regular surveys panelists open on their mobile phone. Even fewer researchers, just 19 percent, are using mobile for qualitative work. The research industry seems set to lag behind other industries, those which all our clients operate in, when it comes to embracing mobile innovation.

A cautious approach

If you asked people in the market research industry to identify the reason for the slow adoption of mobile research, many would point to methodologists who advocate for a cautious approach. At conferences and in conversations, we most often see fingers aimed at so-called "traditionalists" who insist that an exceptionally slow investigation of new platforms is required to preserve data quality.

On the supplier side, many say their clients are the reason for the slow incorporation of mobile, insisting that "mobile isn't what they're asking for." Some even contest the notion of slow adoption, citing the percentage of their panelists opening and responding to surveys on a mobile device as "mobile research." Researchers single out mobile research as a distinct survey mode, a separate component of the research plan that requires specific expertise. The result is that mobile research seems overwhelming to researchers, despite how similar it is to desktop research.

The Google Consumer Surveys team thinks the best way to catalyze the adoption of mobile research is to reorient ourselves. When we launched our desktop platform in March 2012, we insisted that the priority in a modern research platform must be the respondent experience. We kept surveys short, implemented response and character limits into our questions and didn't offer cumbersome question formats like matrices. Many of these best practices are the same as the techniques advised for mobile survey design. Not surprisingly, we've found they have many benefits on desktop data quality also, as evidenced by many validation studies run on our platform.

There is no such thing as mobile research. We're designing market research tools for a multiscreen world. When it comes to survey design, if you're designing your desktop surveys in a respondent-first way, then mobile devices are really just a variant of a laptop or desktop computer. Questionnaires are written, read and answered in a similar style. Compared to the transition from landline to online, desktop to mobile is far less dramatic. Yet, classification of smartphone and tablet research as mobile research has made the change seem much more severe than it really is. As result, researchers feel ill-equipped to embrace mobile, seeing it as an unknown new medium versus an expansion of current practices.

Orient themselves to take advantage

Researchers certainly believe in the long-term prospect of mobile. A *Quirk's* reader study in 2013 ranked mobile research as the "new technique" with the highest potential, at nearly 74 percent of responses. At Google Consumer Surveys we believe its our responsibility to build technology that empowers researchers in order to hasten adoption mobile adoption. If researchers want to be seen as innovators, they must orient themselves to take advantage of the mobile tools being build by Google and other providers.

We know that the ubiquity of mobile device usage globally and the feature set of smartphone devices together can magnify researchers' ability to conduct great research. The burden on the platform developers is to build technology that captures the scale and capabilities of mobile devices. In the same vein, researchers must help accelerate the shift to mobile if they want to be leaders within their organizations. Embracing mobile means realizing that that "going mobile" is about much more than a panelist opening a mobile-formatted survey. It goes well beyond creating a mobile-optimized version of an existing questionnaire. Researchers must evolve from thinking about mobile research as its own practice to thinking about a singular, cross-platform approach. Only then will they move the industry in line with consumer behavior.

Finding the right mix

Until now, the major limitation facing app-based survey platforms has been the same challenge experienced in traditional panel recruitment: finding the right mix of incentive and medium to attract willing respondents is difficult and expensive. Google Consumer Surveys has set out to solve the recruitment problem by yet again prioritizing the respondent experience. With the launch of the Google Opinion Rewards survey app on the Android platform, for example, Google Consumer Surveys sought to introduce a respondent-friendly survey experience that maximizes respondent value. By offering a Google Play credit incentive and maintaining short surveys we have attempted to create the best user experience possible. This integration with the Google Play Store and focus on the respondent has led to the accelerated onboarding of respondents. Roughly six months after launch, Google Opinion Rewards has more than 500,000 users.

With significant uptake in individual markets like the U.S., hyperlocal research become far more feasible. The overall result of this mobile scale could be truly global and local platforms that enable research for businesses of all sizes, throughout the world. The speed and turnaround times of studies, given such a large sample base, could rival that of any data collection source. Researchers must realize that this future is not far off and begin preparing for it now.

We owe respondents more

For researchers, beginning to adjust their research practices today is critical to long-term and competitive advantage. However, research editorials and conference presentations of the past year have offered guidance on how to mobile-optimize surveys and other research practices. The results of this type of optimization, until now, is typically either reformatting the look of questionnaires to show up on mobile devices nicely, or identifying separate, minor projects to run as mobile-only.

These solutions are limited, at best. To make the most of mobile, we owe respondents more than to take an extensive online survey and format it to a small screen. Most of us are mobile users ourselves – we know how different our attention spans on our smartphones and tablets! When it comes to mobile-only projects, we can't possibly expect to drive innovation by designating the least important and/or shortest projects to be the ones that are mobile-only.

The truth is, the very notion of mobile-optimized is an intermediate step, a crutch for timid adopters. Researchers should really be overhauling their surveys, both for mobile AND desktop, to fit into the so-called mobile-optimized mold. At Google Consumer Surveys, we call this "respondent-optimized." Respondent optimization, like mobile optimization, might require dropping questions, shortening answer lists and the use of sometimes unfamiliar survey designs. But, it is only a matter of time until we must do those things. Starting now gives us the chance to get out in front and learn how to do it right on any device.

Luckily for researchers, the industry has been and is developing many solutions that make the challenges of these shorter, more respondent-friendly surveys easier. Data fusion, modeling and modularization can all alleviate the constraints of fewer questions and limited formats. Once surveys are optimized across platforms, outlets like Google Consumer Surveys have created unified survey creation tools that work on both mobile and desktop. This is surely the future, and will help researchers by reducing overhead, avoiding the need for device-specific survey designs going forward.

Methodologists and researchers should aggressively explore and identify the best practices and guidelines for respondent-optimized surveys. It is the willingness to begin adopting these approaches before the ecosystem forces us to that will separate the innovators (and winners) from the rest.

Jon Sadow is product manager at Google Consumer Surveys, San Francisco. He can be reached at jsadow@google.com.

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[2]*Internet Research*, "The value of online surveys," Evans and Mathur 2005.

[3]"The growth of multichannel retailing," http://www.gfoa.org/downloads/0407MULTICHANNEL.pdf, Forrester Research 2003.

[4]GRIT Report, Winter 2014.

Names of Note

■ **Tim Hoskins** has been named president of *Quester*, a Windsor Heights, Iowa, research company.

■ Clothier *Lands' End*, Dodgeville, Wis., has named **Steven Rado** as senior vice president, chief marketing officer. Marketing research and consumer insights will be among his responsibilities.

Fanuele

■ **Joanna Fanuele** has rejoined the U.S. team of London research firm *Hall and Partners* as global strategic partner.

■ *The Advertising Research Foundation* has added **Brandon Cooke**, global chief marketing officer of mcgarrybowen, and **Magid Abraham**, executive chairman of comScore, to its board of directors.

■ Allen, Texas-based network services firm *Nexius* has named **Julia Pitlik** vice president of marketing. Marketing research will be among her responsibilities.

■ *IFF Research*, London, has hired **Pamela Bremner** as director, employment/benefits and health/lifestyle, and **Danny Millar** as director, interviewing services.

■ *Research Now*, Plano, Texas, has appointed **John Rothwell** as managing director, Americas.

quirks.com/articles/2014/20140712

■ Los Angeles-based *uSamp* has added **Joe Jordan** as vice president, panel operations.

■ Austin, Texas, research firm *icanmakeitbetter* has added **Kirk O'Connor** as director of sales.

Weiss

■ *MarketVision Research*, Cincinnati, has promoted **Brad Weiss** to vice president and **Stacey Beaty** to research manager. In addition, **Rebecca Schraffenberger** has joined as a research director in the firm's qualitative research group.

Beaty

■ *Sonic Corp.*, Oklahoma City, has promoted **James O'Reilly** to chief brand officer and **Todd Smith** to chief marketing officer.

■ **Gayle Ireland**, founding partner of Charlotte, N.C., research company *Voccii*, has received her Professional Researcher Certification.

■ London research company *Kantar Media* has named **Anna Reeves** global commercial director.

■ Pretoria, South Africa, research company *Ask Africa* has appointed **Ken McArthur** as executive chairman.

■ Atlanta research company *Mystery Researchers* has hired **Andy Barre** as vice president, operations.

■ Jupiter, Fla., research company *Quick Test/Heakin* has promoted **Christy Crossan** to director, account management and **Heather Hyland** to account representative.

■ London research company *TNS* has appointed **Simon Oastler** as digital development director.

■ *Ipsos*, Paris, has promoted **Clifford Young** to president of Ipsos Public Affairs in the U.S. and **John Vidmar** has been named chairman of Ipsos Public Affairs in the U.S. Also, **Julia Clark** was appointed vice president in the Chicago office.

Landfried

■ *Schlesinger Associates*, an Iselin, N.J., research company, has appointed **Jade Landfried** as chief technology officer and named **Matt Campion** executive vice president.

■ *The Market Research Society*, London, has appointed **Jane Bainbridge** as editor of research-live.com and *Impact* magazine.

■ London technology company *Face* has hired **James Hirst** as global business development director. Also, **Sofia Mavros** joined as research director and will be based in Hong Kong.

■ **Carol Abrahams** has joined *Metrix Consulting*, a Perth, Australia, research company, as business director.

■ London research company the *Pineapple Lounge* has hired **Dylan Brownsword** as quantitative director, **Ben Frost** as qualitative research manager and **Lucy Seager** as quantitative research executive. Also, **Gemma Martinez** has joined as senior project manager and **Dee Cahill** as field manager.

■ New York marketing company *Katz Media Group* has hired **Stacey Lynn Schulman** as executive vice president of strategy, analytics and research.

■ London research company *TNS* has promoted **Chaitanya Reddy** to political and social director for the Mekong region, which includes Vietnam, Thailand, Cambodia and Myanmar.

■ **Zach Foster** has joined St. Louis research company *Brädo Creative Insight*.

■ Atlanta research company *CMI* has hired **Mary Campbell** as director of business development in the Life Sciences practice.

■ Chapel Hill, N.C., research company the *Futures Company* has named **Radha Patel** as director of consulting and has hired **Tara Hirebet** as senior consultant. Both will be based in the Singapore office.

■ **Phil Pringle** has joined Philadelphia management consulting firm *Hay Group* as senior consultant in its employee opinion research division.

■ New York research company *Millward Brown* has named **Jerome Simulin** senior vice president, strategic client growth, Europe. He will be based in the Paris office.

■ *QuestBack*, a Bridgeport, Conn., enterprise feedback management firm, has appointed **Paul Barnes** as country manager for its U.K. operations.

■ Antwerp, Belgium, research company *Helion Research* has opened an African regional office in Johannesburg. **Ian Jeffrey**, as managing partner, and **Ronelle Van Rensburg**, as client director, will lead the operation.

■ Stockholm research company *Cint* has expanded its U.K. sales team with **Jane Attale** as U.K. sales director, **Natalie Eaton** and **Lyubomir Siderov** as sales representatives and **Will Atkinson** as customer support representative.

■ Westport, Conn., research company *Critical Mix* has hired **Brett McCready** as vice president, account development.

■ **Tony Bonn** has joined Atlanta research firm the *Marketing Workshop* as senior lead developer.

■ Palo Alto, Calif., research software company *Attensity* has hired **Frank Brown** as CFO and **Tommy Hawkins** as vice president of development. Also, **Martin Onofrio** has been named CRO.

■ Lindon, Utah, software company *NUVI* has named chairman and co-founder **Keith Nellesen** as CEO.

■ London research company *SPA Future Thinking* has hired **Claudia Strauss** as client development director.

■ Plano, Texas, firm *Research Now* has appointed **Stephanie Marty** as client development director for CSM, France. She will be based in their Paris office.

■ *Grand View Research Inc.*, San Francisco, has named **Shashi Kumar** as CEO.

■ *Principia Consulting Inc.*, a Malvern, Pa., firm, has hired **Mark Daniel** to oversee business development and growth initiatives.

■ *GfK*, Nuremburg, Germany, has hired **Paul Campbell** as research director for its London office. Based in New York, **Paul Barnes** and **Cheryl Mulherin** have joined GfK as senior vice presidents in its North American Health team.

■ **Nicola Blythe** has joined London research company *BritainThinks* as a senior research executive.

■ Shanghai research company *Asia Market Development* has appointed **Genie Yip** as digital strategy manager.

■ Espoo, Finland, research company *Verto Analytics* has hired **Chris Modzelewski** as chief research officer, based in New York. Also, **Timo Smura** has joined the firm as head of research and analytics, based in Finland.

■ Port Washington, N.Y., research company *NPD Group* has hired **George Terhanian** as group president and chief of analytics and research.

■ **Brian Lamar** has joined *EMI Research Solutions*, Cincinnati, as director of insights.

Research Industry News

News notes

■ *The Boston Herald* reported that New York researcher the **Nielsen Company** has acknowledged problems in its sampling for New Hampshire and Massachusetts television stations. A WCVB television sales manager blamed its ratings decline on Nielsen sampling too many viewers under 35 and New Hampshire residents while undersampling the Massachusetts segment, causing double-digit declines in numbers.

■ Portland, Ore., research company **Decipher** has offered $2,500 to match any new private or corporate donations to the nonprofit Schoolhouse Supplies program, Classroom Champions, for a total donation of $5,000. The program provides teachers and students free classroom supplies. For information on how to give, contact Lisa Palermo at 503-249-9933 ext. 9.

■ Sixteen trade associations including the **Direct Marketing Association** asked the U.S. Congress to establish a national standard for notifying consumers of a security breach.

■ **Thoroughbred Research Group**, Louisville, Ky., has been selected as a preferred vendor for the Renal Services Exchange Program to provide administrative services to National Renal Administrators Association members.

■ Shelton, Conn., research company **SSI** hosted a March for Babies walkathon in which more than 50 SSI employees, friends and family participated. This is the annual fundraising event for the March of Dimes. The SSI representatives raised over $6,900 and SSI contributed another $3,100 for a total donation of $10,000.

quirks.com/articles/2014/20140713

■ The Court of Justice of the European Union, Luxembourg, ruled against **Google Spain** and **Google Inc.** and in favor of a Spanish citizen requesting that the search engine remove links to his information. The court found that the Google search engine could be considered a data controller and was subject to the same rules as all other companies handling personal information, thereby requiring Google remove outdated information about a person at their request.

■ Baldwinsville, N.Y.-based **Research and Marketing Strategies** has received approval as a survey vendor for the 2014 In-Center Hemodialysis Consumer Assessment of Healthcare Providers and Systems Survey (ICH-CAHPS). The firm has also been chosen by the Renal Services Exchange, a subsidiary of the National Renal Administrators Association, as a preferred vendor to conduct ICH-CAHPS patient surveys.

Acquisitions/transactions

■ Palo Alto, Calif., research company **TIBCO** has acquired San Francisco software company **Jaspersoft**.

■ Nuremberg, Germany, research company the **GfK Group** has acquired **TerrEtude**, a Mouchamps, France, agricultural tracking company, and will integrate it into its GfK Kynetec France division. Separately, GfK announced that it has become the majority shareholder in **Genius Digital**, a U.K.-based firm that captures and analyzes viewer data for the TV industry.

■ Walldorf, Germany software company **SAP** has agreed to acquire **SeeWhy**, a Boston technology company.

■ New York research company **Kantar** has sold its Colorado-based call center business, **Center Partners**, to outsourcing company Qualfon, Mexico.

■ New York company **Nielsen** is closing its Scarborough Research's call center in Sarasota, Fla. Scarborough is now part of Nielsen's Local Insight Suite. Separately, Nielsen is closing its call centers in Columbia, Md., and Radcliff, Ky.

■ Chicago research company **Precision Dialogue** has acquired **Opinion Centers America**, a Cleveland research company. The Opinion Centers staff will relocate to the research and customer experience division in the Westlake, Ohio, office of Precision Dialogue under Cathleen Zapata, chief experience officer.

■ Louisville, Ky., technology company **ZirMed** has acquired **Intelligent Healthcare**, a Santa Monica, Calif., medical information firm. The Intelligent Healthcare services, which include the collection and analysis of data from health care information sources, will be integrated into the ZirMed platform.

■ Rotterdam, the Netherlands, research company **MetrixLab** announced that **MarketTools**, San Francisco, and **CRM Metrix**, Paris, have been integrated into the Metrix Lab network. All U.S., European and Asian offices will now operate under the MetrixLab brand. MetrixLab had acquired CRM Metrix in 2010 and MarketTools in 2012.

■ **C Squared Networks**, a London marketing firm, has acquired the **I-MIS benchmarking survey**, which analyzes the reputations of international media agencies and brands.

■ New York technology company **Unified Social** has acquired San Francisco software company **awe.sm**. Awe.sm's technology will be integrated into the Unified software platform.

■ **Google** has purchased software company **Adometry**, Austin, Texas, which will become part of Google's Analytics unit. Adometry's SaaS-based program is designed to track how marketing efforts lead to purchases.

■ New York research company **Millward Brown** has agreed to acquire Bucharest, Romania, research company **Daedalus Consulting S.R.L.** and its subsidiary Visionwise Consulting S.R.L. Daedalus founder Daniel Enescu will continue in his position of chairman of the board; Daniela Lazar will continue as managing director.

■ **AOL**, New York City, has acquired technology company **Convertro**, Santa Monica, Calif. Convertro's attribution and marketing analytics software is designed to maximize return on advertising purchases.

■ London research company **Marketing Sciences** has acquired **Walnut Group**, a London neuroscience firm. Walnut Group founder Cristina de Balanzo has joined the Marketing Sciences staff.

■ Boston research company **Extreme Reach** acquired Emeryville, Calif., advertising firm **BrandAds**. The acquisition is designed to provide clients with additional information on advertising reach and audience demographics.

■ Calgary, Canada, marketing company **Chaordix** has acquired **Napkin Labs**, a Denver technology company.

■ Little Rock, Ark., technology company **Acxiom** has agreed to acquire San Francisco marketing company **LiveRamp** for approximately $310 million in cash, with the transaction expected to close in mid-summer.

■ San Francisco software company **Meltwater Group** has acquired **Strategic Planner**, a Montreal software firm.

Alliances/strategic partnerships

■ Atlanta firm **Next Level Research** and Chicago marketing company **Acclaro** have reached an agreement for Next Level Research to provide research services for Acclaro clients. Joel Reish, Next Level Research president, was also named as research director for Acclaro.

■ Boston social media software company **Crimson Hexagon** has partnered with Vancouver, Canada social media management company **HootSuite**. The arrangement will allow Crimson Hexagon's ForSight platform to stream information into the HootSuite platform and for its customers to plug their analytics directly into HootSuite.

■ Ottawa, Canada, research company **Ramius Corporation** has partnered with **Blauw Research**, Rotterdam, the Netherlands, to use the Ramius Recollective software platform for the Blauw online research communities.

■ Littleton, Colo., payment disbursement company **CheckIssuing** has joined the **Pharmaceutical Marketing Research Group**, Minneola, Fla.

■ London research companies **dunnhumby** and **SkyIQ** have paired dunnhumby's customer behavior analysis with the SkyIQ's viewing panel to assist clients in understanding of the effectiveness of their TV advertising.

■ **Market Publishers Ltd.**, London, has partnered with **Goulden Reports**, Wiltshire, U.K., and **Greystone Research Associates**, Amherst, N.H., to distribute and sell their research reports.

■ Waltham, Mass., research company **Affectiva** and **20|20 Research**, Nashville, Tenn., have partnered to distribute Affectiva's facial coding software, Affdex Discovery.

Association/organization news

■ Steve Schlesinger, CEO of Schlesinger Associates, and Merrill Dubrow, CEO of M/A/R/C Research, have collaborated with the **Qualitative Research Consultants Association** (QRCA) to introduce and fund the Young Professionals Grant. The QRCA Grant Committee will offer 10 enthusiastic young qualitative research professionals the opportunity to attend the 2014 QRCA Annual Conference in New Orleans on October 15-17. The Grant will welcome applications from individuals who are 35 years or younger. To qualify, a researcher's primary professional role must consist of designing, conducting and analyzing qualitative research - or the person must be in training to conduct these activities. The closing date for applications is August 14. For more information visit www.qrca.org/ypg.

■ London research company **Euromonitor International** has entered into partnership with Amsterdam-based **ESOMAR** and will support ESOMAR events throughout the year.

■ The boards of directors of the **Association of National Advertisers** (ANA) and **Brand Activation Association** (BAA) have approved plans for the ANA to acquire the BAA as of July 1, 2014.

Awards/rankings

■ Paris research company **Ipsos** InnoQuest received a Bronze Award at the Edison Awards ceremony for its Archetype IQ System. The award was for Research and Business Optimization in the Applied Technology category.

■ Oslo, Norway, research company **Confirmit** has received a 2014 CRM Excellence Award, presented by *CUSTOMER* magazine.

■ Indianapolis software company **Interactive Intelligence** was named a 2014 Service Leader winner in the category of interactive voice response by CRM magazine.

New accounts/projects

■ **The Yaffe Group**, a Detroit marketing agency, has expanded its contract with Portland, Ore., research company **Rentrak Corp**. to completely replace its current measurement service with Rentrak's rating service. Separately, Rentrak signed a contract with **Kelly Scott Madison**, a Chicago media agency, to provide its StationView Essentials television ratings service.

■ Singapore research company **Fisheye Analytics**, a division of Kantar Media, has retained its contract with the **World Economic Forum** for an additional three years.

■ Los Angeles direct response agency **D2H Partners** has selected New York software company **Info Tech**'s Media Management System.

■ New York marketing company **IPG Mediabrands** has selected Reston, Va., Internet company **comScore**'s validated

Campaign Essentials software for evaluating digital display and video campaigns.

■ New York company **IBM** announced that **Television Broadcasts Limited**, a Hong Kong television station, has adopted its Social Media Analytics technology which is designed to analyze social media comments.

■ Research software company **MFour**, Costa Mesa, Calif., has adopted the Socrates qualitative moderator technology of Windsor Heights, Iowa-based research company **Quester** for use in MFour's Surveys On The Go mobile research tool to add probing and other qualitative research features to mobile surveys.

■ London charity the **Children's Society** has selected **ResearchBods**, a Leeds, U.K., research company to build and manage its online supporter panel.

■ Boston software company **Experian Data Quality** announced that **McMillion Research**, Charleston, W. Va., will use its data enhancement and data quality services to verify new as well as current panelists.

■ The **Muscular Dystrophy Association**, Tucson, Ariz., has selected Omaha, Neb. research company **Infogroup Targeting Solutions** to manage its donor lists.

New companies/new divisions/ relocations/expansions

■ Beijing Internet company **Baidu** opened its U.S. research and development center in Sunnyvale, Calif., adding to its AI Lab, Beijing Deep Learning Lab and Beijing Big Data Lab. Andrew Ng has been appointed chief scientist.

■ Seattle research company **Global Market Insite** has opened a new office in Frankfurt and has appointed Norman-Rene Schwalme to lead the office.

■ **The Ipsos MediaCT** division of Paris research company Ipsos has opened a data science unit in London, led by Neil Farrer as chief data science officer.

■ London recruitment company **Aspire Global Network** has repositioned all its divisions, including pfj, the Graduate Recruitment Company, RPCushing, Periscope and Aspire Global Network Asia, to operate under the Aspire name.

■ Palo Alto, Calif., survey software company **SurveyMonkey** will open an office in Sydney, Australia, making Australia the first country outside the U.S. to have access to all SurveyMonkey products, including Enterprise, Audience and Contribute.

■ Research company **Hall and Partners** has moved its global headquarters to Procter Street in London due to recent growth.

■ **Radius Global Market Research**, New York, has opened a Beijing office. Cindy Han has been appointed as managing director, Radius Asia.

■ Asian market research company **ABN Impact** has opened an office in Shanghai, China, and has appointed Stephane Courqueux as managing director.

■ London research company **Flamingo** has opened a Sao Paulo location. Andy Connor will lead the office.

■ Dallas research company **ConsumerDNA** has opened, after acquiring the assets of **Savitz Research Solutions**. Michael Kassab, former president of Savitz Research, has been appointed CEO. The company is online at www.dnamarketresearch.com.

■ Gladys Concon, Patti Allen and Barbara Ireland have launched **Observations**, a Newmarket, Canada, research company. Observations is online at www.observationsinc.ca.

■ Chicago research company **AdGooroo**, a Kantar Media company, has opened a London office.

■ Jim Easton, Jonny Baynes and Phil Stone have launched **Plural Strategy Group** in London. The company is online at www.pluralstrategy.com.

Research company earnings/ financial news

■ Pasadena, Calif. research company **UberMedia** has received $8 million in funding from Gordon Crawford, Capital Research and Management, and Blue Chip Ventures.

■ Stamford, Conn., research company **Gartner** reported first quarter revenue of $446.7 million, a 10 percent increase.

■ Indianapolis research company **Interactive Intelligence Group** has reported first-quarter 2014 revenue of $79.4 million, an 8 percent increase.

■ Stuart, Fla., research company **Information Services Group** has announced first-quarter 2014 revenue of $48.2, a drop of 5 percent.

■ **DJS Research**, Cheshire, U.K., reported a 32 percent increase in 2013 revenues over 2012.

■ Palo Alto, Calif., software company **Attensity** has raised $90 million in equity financing.

■ Nuremberg, Germany, research company **GfK** announced financial results for first quarter 2014. Adjusted operating income increased by 2.7 percent to €23.6 million despite revenue declining 3.7 percent to €344.9 million.

■ Stockholm technology company **Innometrics** has announced a $5 million Series A funding round to allow European expansion and enhancements to its Profile Cloud solution.

■ Boston Internet company **Ditto Labs** has raised $2.2 million in a second round of funding.

■ St. Louis software company **Click With Me Now** has raised $2.25 in investment funding and has named Bud Albers as CEO.

■ Hampshire, U.K. research firm **eDigitalResearch** reported a 20 percent revenue increase in 2013.

■ Singapore research company **YOYO Holdings** raised $1.3 million, which will be used to increase its growth, strengthen its management and staffing levels and boost its marketing efforts.

■ Chennai, India research company **ResearchSuite Technologies** has secured angel funding from start-up investor Pravin Shekar, who joins the ResearchSuite board of directors as the chairman in a non-executive capacity.

CALENDAR OF EVENTS

••• can't-miss activities

featured

Gutcheck will hold a complimentary Webinar, titled "How PepsiCo Got Off the Concept Testing Hamster Wheel," on July 10 at 10 a.m. MDT. For more information and to register visit http://gtchk.it/1nkB6Ui.

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

featured

Quirk's will hold Cocktails With Quirk's, a free networking event for MR professionals, from 7 p.m. to 11 p.m. on July 14 at Timothy O'Toole's in downtown Chicago. This event is being held in conjunction with the IIR's Shopper Insights in Action conference. The party is free to attend and open to all Quirk's subscribers and supporters but space is limited, so register in advance at linktrack.info/cocktails_chicago.

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.cmoexchangelatinamerica.com.

The International Quality and Productivity Center will hold a conference, themed "Data Analytics for Financial Services," on July 22-23 in Boston. Visit http://bit.ly/1n3oFkK.

featured

Toluna will host a complimentary Webinar, titled "Brand Positioning Studies Just Got Smarter," on July 23 at noon CDT. Visit http://tinyurl.com/llmgnya.

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 2014 Pharma CI Conference and Exhibition will be held on September 9-10 at the Hilton Parsippany Hotel in Parsippany, N.J. Visit http://pharmaciconference.com.

Marcus Evans will host a conference, themed "Consumer Insights and Analytics," on September 10-12 in Amsterdam. Visit www.marcusevans.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.

Strategy Institute will hold a conference, titled "Customer Experience Strategies Summit," on September 24-25 in New York. Visit www.digitalcustomerexp.com.

IIR will hold its North American Consumer Insights Event on September 29-October 1 at the Ritz Carlton in Toronto. Visit www.iirusa.com/consumerinsights/home.xml?registration.

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.

The Qualitative Research Consultants Association will hold its annual conference on October 15-17 at the Hilton New Orleans Riverside in New Orleans. Visit www.qrca.org.

The Product Development and Management Association will hold its annual Product Innovation Management Conference on October 18-22 in Denver. Visit www.pim.pdma.org.

The Pharmaceutical Marketing Research Group will hold its annual meeting of The PMRG Institute on October 19-21 at the Hyatt Regency in New Brunswick, N.J. Visit www.pmrg.org.

IIR will hold its annual conference, "The Market Research Event 2014," on October 20-22 at the Boca Raton Resort and Club in Boca Raton, Fla. Visit www.iirusa.com/research/event-home.xml#.

Research & Results will hold its annual conference on October 22-23 at the MOC Convention Center in Munich, Germany. Visit www.research-results.com.

Worldwide Business Research will hold its mobile shopping conference on October 28-30 at The Wigwam, Litchfield Park, in Phoenix. Visit www.mobileshoppingspring.com.

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

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BEFORE YOU GO ••• issue highlights and parting words

••• cover-to-cover

Facts, figures and insights from this month's issue

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When it comes to shopping and healthy snacking, decisions are often unconscious and profoundly irrational, meaning that shoppers are unable to identify different drivers when questioned.

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Despite evidence that many organizations are actively increasing their employee mobility solutions, these initiatives do not come without their challenges.

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Shopper marketers are valued for decision-making because they understand and encourage the links between brand marketing and sales, specifically the retailer's objectives.

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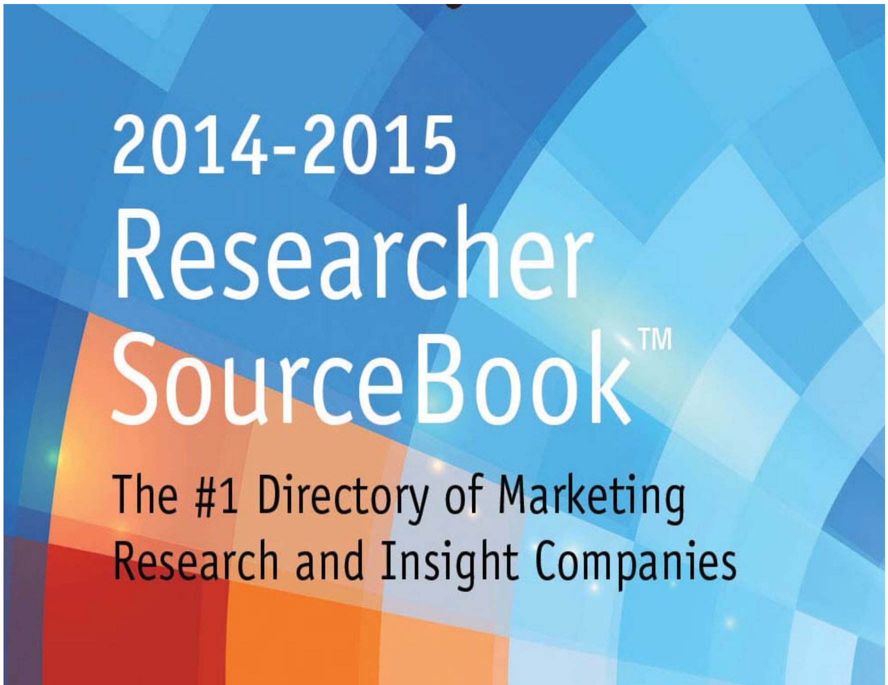
The data suggests that many people try mobile shopping for the first time during the holiday season and then become mobile shoppers for life – making the holidays an excellent time to win their mobile loyalty



Bigger, better SourceBook boasts more listings, more reach

In September, our 24th annual Researcher SourceBook will come out in print and as a digital edition and be included in our magazine app. This year more companies are providing even greater details about their services than ever before – making it an even more valuable resource. In fact, this year's SourceBook will have more listings, the greatest reach and be available in more formats (print, digital, app, PDF and online) than any other directory of research providers.

If you need to find a supplier sooner, use our searchable online version found on quirks.com. It's constantly being updated and contains the most current listing information. And, when contacting a firm, please let them know you found them in Quirk's. Doing so helps us keep our treasure trove of free resources free!

Coming in the August Quirk's

••• hispanic research

Novamex's Erwin Chang outlines how the distributor of Hispanic foods and beverages changed its views on acculturation.

••• new product research

A look at how neuromarketing research helped Bausch & Lomb fine-tune its detailing strategy for a new line of contact lenses.

••• new product research

How to measure the impact of crucial social factors related to new product adoption and development.