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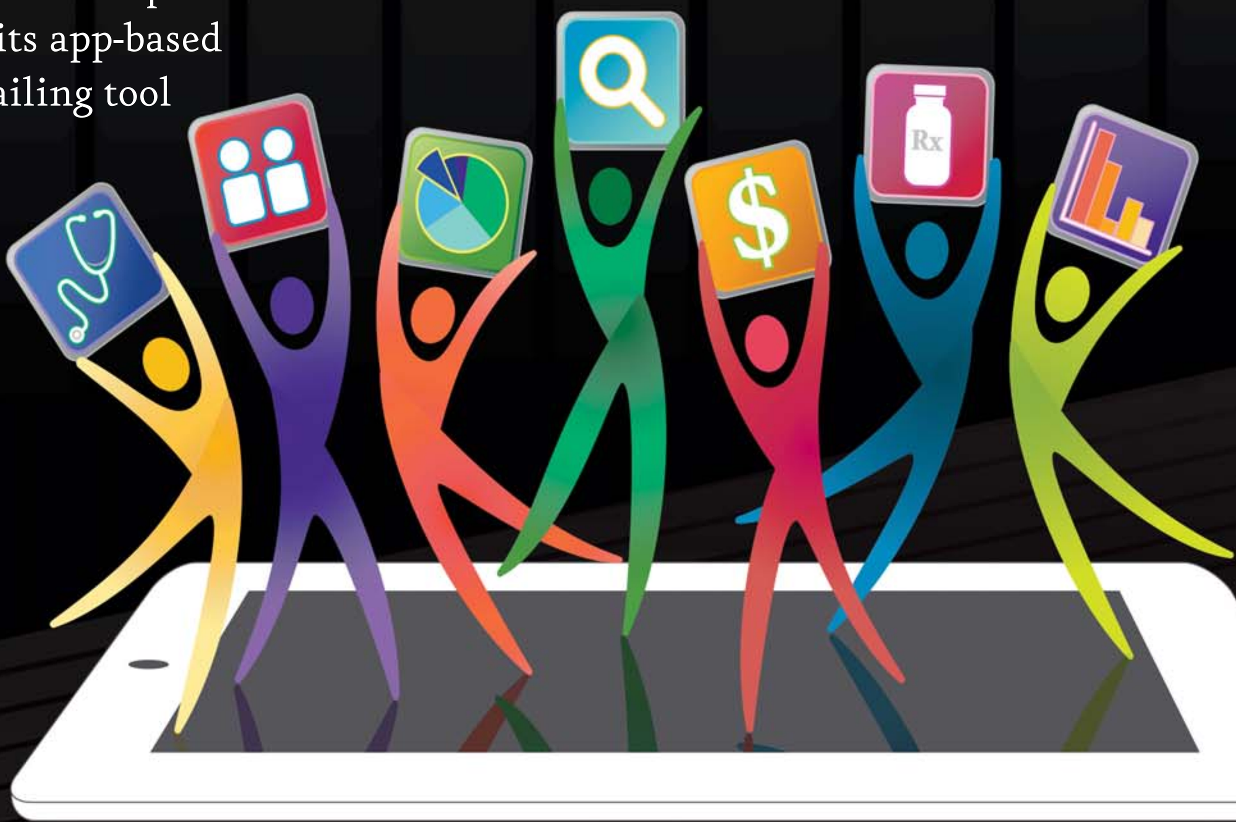

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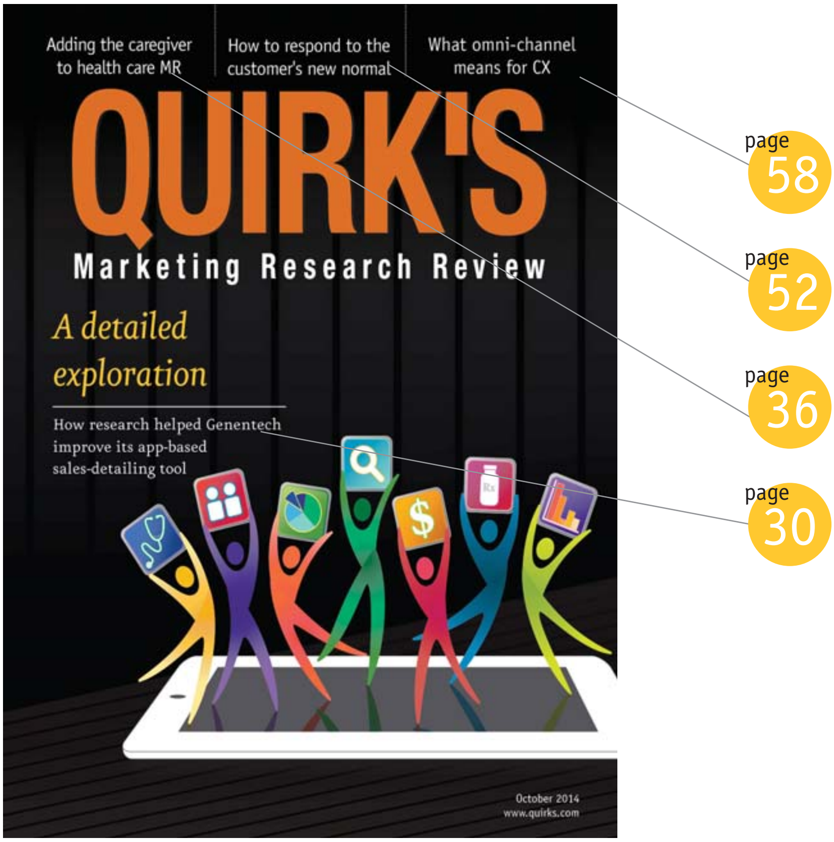

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Quirk's Marketing Research Review
4662 Slater Road | Eagan, MN 55122
651-379-6200 | www.quirks.com

Publisher • Steve Quirk
steve@quirks.com | x202

Editor • Joseph Rydholm
joe@quirks.com | x204

Digital Content Editor • Emily Koenig
emilyk@quirks.com | x210

Circulation Manager • Ralene Miller
ralene@quirks.com | x201

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

Directory Sales • Ilana Benusa
ilana@quirks.com | x213

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

Sales • Lance Streff
lance@quirks.com | x211

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••• travel and leisure research

Travelers research hotels with smartphones but don't book with them

A new study of 2,000 consumers from Boston research firm Chadwick Martin Bailey (CMB) found that mobile, social and online factors influence leisure travelers very differently at separate stages in the purchase journey. Mobile devices play an important role in the initial research phase of hotel planning but are used sparingly to book hotel stays. Over 60 percent of travelers used a mobile device – 47 percent a smartphone – during their hotel purchase journey. But only 6 percent booked their hotel via a smartphone. Mobile applications are used infrequently throughout the hotel purchase journey. In total, only 6 percent of shoppers used a mobile app.

Consumer reviews trump social media in influencing research and evaluation as well as final decisions. Only 13 percent of bookers used social media during the purchase journey vs. 59 percent who consulted consumer reviews.

Price-comparison sites play an important role even when they are not the final purchase location. Nearly half of travelers (49 percent) used a price-comparison site such as Expedia, Priceline or Kayak. Thirty-six percent of those who used one or more of these sites ultimately booked their stay with them.

"There's no shortage of information available to travelers as they plan and book hotels for their vacations," says Judy Melanson, senior vice president of CMB's travel and hospitality practice. "We know their path involves multiple sites and sources of information. The challenge for hotels is to decide how to align their marketing budgets to best intercept potential travelers – delivering desired content on the appropriate device and through the right channels and partners."

quirks.com/articles/2014/20141001

••• financial services

Tablets are money in the bank for banking

Many tablet or e-reader owners use their devices for banking activities and see this as their primary banking method, according to a recent survey by Synergistics Research, Atlanta.

Nearly half of Internet households own a tablet or e-reader with Web browsing capability. Of these tablet/e-reader owners, three-quarters are using these devices for banking or bill payment activities. This represents one-third (34 percent) of all Internet households and usage increases steadily with income. Furthermore, three in 10 tablet banking users view it as a primary method of performing financial activities. The largest proportion – close to half – see it as a secondary method. One-fifth use tablet banking as an emergency method when it is absolutely necessary.

"It is quite impressive that in a relatively short time frame three-quarters of tablet/e-reader owners, representing one-third of Internet households, are using their devices for banking activities," says William H. McCracken, CEO of Synergistics. "Providers should expect that tablet banking will increase as more tablets/e-readers get into the hands of consumers and should incorporate tablet banking as a part of their online channel strategies."

By Joseph Rydholm, Quirk's Editor

'Internet of things' study highlights our conflicted relationship with privacy


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Joe Rydholm can be reached at joe@quirks.com

We consumers are funny creatures. As has no doubt been observed many times, there is a great disconnect between all of the hand-wringing over data privacy and our collective social media habits. We freak out about who's doing what with our information at the same time as we bare our souls (and so much more) on Facebook, Instagram and Twitter.

It's for this and other reasons that I've been watching the rise of the whole "Internet of things" concept with interest. People seem to have some of the same types of conflicted reactions to wearing a monitor that will track and report their activities or to using a smart thermostat made by a company owned by Google. We love the convenience and the potentially life-changing impact that these tech marvels can have but we also (wisely) realize how creepy some of them potentially could be if the wrong entities got involved.

Findings from the 2014 State of the Internet of Things Study, by Acquity Group, a digital marketing agency, highlight this battle. The study found that 80 percent of consumers have privacy concerns with wearable Internet-connected technologies but half of those same consumers said they would be willing to share personal data collected by such devices with third-party retailers when presented with compensation such as a coupon or discount.

While only 9 percent of consumers stated they would share data with brands for free, those percentages dramatically increase when consumers are presented with a coupon or discount in exchange for sharing data.

Specifically, consumers are most willing to share wearable data in exchange for:

- coupons and discounts based on their lifestyles (28 percent);
- information on better workouts to reach their goals (22 percent);
- information on the best foods to eat to reach their goals (22 percent);
- coupons for fitness gear (19 percent).

Which third-parties would they be willing to share data with? Fifty-three percent of consumers said they would share with doctors; 27 percent with family and 17 percent with friends. Less than 40 percent of consumers wouldn't share data with anyone.

When it comes to smart appliances, while cost is a consideration, consumers are comparatively less worried about price than other factors, especially when it comes to safety over novelty:

- 83 percent of consumers would pay a premium for a smart smoke alarm, equipped with features such as clear emergency instructions and Wi-Fi capabilities;
- 59 percent would pay a premium for a smart refrigerator, equipped with features such as an LCD screen showing food quantity and expiration date;
- only 22 percent express strong concerns about the price of these devices.

Beneficial vs. creepy

Again illustrating the razor's edge of beneficial vs. creepy, some consumers believe those potentially invasive-sounding smart appliances would be just fine – and they would even be willing to pay a premium in some cases. For example, the features consumers believe would be most beneficial in connected in-home technology such as smart refrigerators include:

- location-based automatic coupons or offers on their mobile device for frequently-purchased foods (86 percent);
- information on the least-expensive places to purchase favorite products (82 percent);
- recipes on their mobile device for food they can make from the products in their refrigerator (85 percent).

On that last one, thinking back to the contents of some of the refrigerators I opened during my college years, I shudder to think what kinds of recipes would've been suggested!

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

// Survey Monitor

••• millennials research

With Millennials, trust opens doors

They'll provide more personal data to net more relevant offerings

Millennials in the U.S. will respond to brands when brands use data specific to the Millennials to create a contextualized and personal customer experience, according to a new study by SDL, a U.K.-based customer experience management firm.

Millennial consumers are increasingly aware of the data that brands are collecting on them but reactions to the data-collecting differ around the world. In a global study by SDL, more than 40 percent of Millennials in the U.S. could identify the digital data brands are using to track their behaviors, setting the expectation that marketing touchpoints should be personalized, contextual and timely – a fair value exchange.

Customer data has become the currency for engagement with Millennial consumers:

- Give more to get more: Over half of the respondents in the U.S. (52 percent) have no issue with brands using data to provide a better customer experience.
- Privacy over purchase: Globally, Millennials had drastically different responses when asked if it's OK for brands to use customer data to personalize their experiences, with only 37 percent of U.K. Millennials in agreement and an even smaller amount of 13 percent agreement recorded in the Netherlands.
- Transparency translates: 60 percent of U.S. Millennials will provide more personal data to a company they trust. If brands are using tracked information to better the customer experience, consumers will see how the data is being used and ultimately begin to trust the motives of the brand – fostering future engagements and ultimately purchases.
- Time is money: Additionally, 46 percent of Millennials, globally, are willing to provide more data to businesses if it means they aren't forced to entertain offers that aren't relevant.

Brands should practice greater transparency in their marketing efforts to customers, specifically to win over the Millennial generation. Showing consumers how the data is being handled and using it to offer them more will lead to brand loyalty, in the U.S., in the long run. "With the ability to understand what consumers in the Millennial generation want from brands, it is up to marketers to ensure they get it," says Paige O'Neill, CMO at SDL. "Consumers in the U.S. do not want or expect the same as consumers across the globe and personal data that is collected by brands daily clearly states this. Big data, without sifting through to obtain the small portion relevant for customers, has no value when it comes to the customer experience. For success, marketers need to spend time focusing on what matters to the consumers in the region they are selling in and alter their strategies to align."

The survey findings are featured in SDL's second report of the Five Truths for Future Marketers series titled Your

quirks.com/articles/2014/20141003

Data Trumps Big Data. This report examines the need for marketers to analyze customer data above all other data to gain a competitive edge in customer experience management, particularly when marketing to millennials, and can be downloaded at http://sdl.com/fivetruths-data.

The study sampled more than 1,800 Millennials (ages 18-36) across the globe, with more than 300 respondents in each country including the U.S., U.K., Australia, Norway, Denmark and the Netherlands. It was conducted between January and April 2014. The first data set sampled more than 300 Millennials in the U.S. only. http://sdl.com

••• employee research

40-hour workweek? Try 47.

Is it personal gumption or pay-structure function?

Adults employed full time in the U.S. report working an average of 47 hours per week, almost a full workday longer than what a standard five-day, 9-to-5 schedule entails. In fact, half of all full-time workers indicate they typically work more than 40 hours and nearly four in 10 say they work at least 50 hours, as reported by Lydia Saad of Princeton, N.J.-based Gallup.

The 40-hour workweek is widely regarded as the standard for full-time employment, and many federal employment laws – including the Affordable Care Act or Obamacare – use this threshold to define what a full-time employee is. However, barely four in 10 full-time workers in the U.S. indicate they work precisely this much. The hefty proportion who told Gallup they typically log more than 40 hours each week pushes the average number of hours worked up to 47. Only 8 percent of full-time employees claim to work less than 40 hours.

These findings are based on data from Gallup's annual Work and Education Survey. The combined sample for 2013 and 2014 includes 1,271 adults, aged 18 and older, who are employed full time.

While for some workers the number of hours worked may be an indicator of personal gumption, for others it may be a function of their pay structure. Hourly workers can be restricted in the amount they work by employers who don't need or can't afford to pay overtime. By contrast, salaried workers generally don't face this issue. And, perhaps as a result, salaried employees work five hours more per week, on average, than full-time hourly workers (49 vs. 44, respectively), according to the 2014 Work and Education survey.

Another factor in lengthening Americans' workweek is individuals taking on more than one job. According to past Gallup data, 86 percent of full-time workers have just one job, 12 percent have two and 1 percent have three or more. However, even by restricting the analysis to full-time workers who have only one job, the average number of hours worked is 46 – still well over 40.

The amount of hours that all U.S. full-time employees say they typically work each week has held fairly steady over the past 14 years, except for a slight dip to just under 45 hours in Gallup's 2004-2005 two-year average. Part-time workers have averaged about 20 hours per week less than full-timers, although the precise figure shifts more for part-timers. This is partly due to the lower sample size of this group, resulting in greater volatility in the measure.

Forty-three percent of U.S. adults in the August 2014 survey said they are employed full time, down from about 50 percent in the Work and Education polls conducted each August before the 2007-2009 recession. Meanwhile, the percentage who work part time has consistently hovered near 9 percent.

Shifts in labor force participation can reflect a number of underlying factors in addition to the strength of the economy, including changes in the demographic composition of the population.

The percentage of full-time workers in the U.S. has dwindled since the recession began in 2007 but the number of hours they say they work each week has held steady, at about 47. While four in 10 workers put in a standard 40-hour workweek, many others toil longer than that, including nearly one in five (18 percent) who work a grueling 60 hours or more. That translates into 12-hour days from Monday to Friday – or into shorter weekdays with lots of time spent working on the weekends.

Salaried workers, on average, work even more, with a full 25 percent saying they put in at least 60 hours per week. Thus, while workers earning a salary may enjoy greater income than their counterparts who are paid hourly, they do pay a price in lost personal time.

But this doesn't necessarily mean that workers logging long hours are suffering. According to Gallup workplace management scientists Jim Harter and Sangeeta Agrawal, certain workplace polices – including the number of hours worked – can affect employee well-being. However, having an engaging job and workplace still trumps these factors in fostering higher overall well-being in workers. Highly engaged workers who log well over 40 hours will still have better overall well-being than actively disengaged workers who clock out at 40 hours. In other words, hours worked matters but it's not all that matters. www.gallup.com

••• health care research

Seniors face barriers in seeking dental care

Monetary, transportation problems get in the way

Research has shown that poor oral health can have a negative impact on seniors' overall health and well-being, but for many, there are significant barriers to visiting a dentist, according to a new report in the *American Journal of Health Behavior*.

As reported by the Health Behavior News Service, part of the Center for Advancing Health, via Newswise, lead study author Theresa Montini, assistant medical professor at the Sophie Davis School of Biomedical Education at the City College of New York, and her colleagues provided oral dental exams to 184 older adult volunteers. The average age of the study volunteers was 75.

The researchers found that 89 percent of the participants, who frequented eight senior centers in New York City, needed some form of dental treatment, with an average of two cavities per person. Six weeks following their initial dental exams, 52 percent had sought dental treatment but 48 percent had not been able to access dental services. Seniors who had not received follow-up treatment had significantly fewer teeth and were more likely to have been referred for new dentures or to repair old ones.

Three months after their initial dental exam, those who didn't get subsequent dental care cited three primary barriers – 60 percent noted financial issues, 31 percent said transportation was a problem and 20 percent needed someone to help make the appointment and find a dentist.

The authors note that their findings have several implications for policymakers, such as considering adding dental benefits to Medicare coverage and/or expanding Medicaid dental coverage.

Matt Salo, executive director of the National Association of Medicaid Direction, agrees, noting the study clearly identifies unmet needs of older Americans who would benefit from more reliable, accessible and affordable dental care. "The primary barrier to accessing dental care for older adults appears to be a complete lack of attention – a lack of any kind of benefit from the Medicare program," he says. "Not all seniors are eligible for Medicaid and obviously Medicaid benefits vary, but this wouldn't be an issue if Medicare provided basic [dental] benefits for the population it serves."

Salo says that one important barrier that isn't addressed is having an adequate and responsive dental workforce. "We have found that dentists don't always make accommodations for the unique challenges of the populations that Medicaid and Medicare serve," he says. "Not only are there not enough dentists, there aren't enough dentists willing to work with low-income or challenging populations. Medicaid has struggled for decades to get dentists to participate and the problems go much deeper than payment rates."

••• education research

Study chronicles the college-funding process

More out-of-pocket, less borrowing

Ninety-eight percent of families agree that college is a worthwhile investment but the way they covered the bill last year changed, according to How America Pays for College 2014, a new national study from Sallie Mae and Ipsos. The annual study, now in its seventh year, found that while the average amount spent on college was consistent with prior years, families spent more out of pocket (42 percent of college costs) while overall borrowing (22 percent of college costs) was at the lowest level in five years. Low-income students, in particular, reduced their reliance on borrowed funds when paying for college last year.

Families used grants and scholarships to cover 31 percent of college costs and contributions from relatives and friends paid another 4 percent. "American families truly believe in the value of higher education" says Cliff Young, president of Ipsos Public Affairs. "One size, though, does not fit all. Indeed, families are very creative and diverse in their solutions to paying for college. Our persona analysis really shows the wide range of family-specific choices."

Virtually all families adopted at least one measure to make college more affordable. This year, families reported the highest enrollment in two-year public colleges since the survey began (34 percent, up from 30 percent last year). In addition, students opted to attend in-state institutions (69 percent), cut back on entertainment (66 percent), or live closer to home (61 percent) or at home (54 percent), among other cost-saving measures, to help reduce the cost of college.

Thirty percent of students were the first in their family to attend college. These students were more likely to apply cost-saving measures (76 percent chose a school close to home and 72 percent lived at home), spent less on college overall and received less financial support from their parents.

The study found that fewer than half of respondents – 38 percent – created a plan for paying for all years of college before the student enrolled. In addition, only 40 percent indicated their family had a contingency plan to pay for college in case of unexpected events. Approximately one-third of families reported encountering unexpected expenses last year.

This year's study also sought to understand more deeply the motivations, values and attitudes of families paying for college. It identified four main personas with distinct orientations towards higher education: American Dreamers, Determineds, Reluctant Borrowers and Procrastinators.

Of the four personas, American Dreamers represented 28 percent of respondents, many of whom were the first in their family to attend college. American Dreamers were driven by the aspirational values associated with a college education and relied heavily on financial aid to make it a reality. Determineds represented another 28 percent of respondents and were most prepared to meet college costs (80 percent had created a plan to pay for college, 85 percent had a contingency plan to pay). Reluctant Borrowers represented 18 percent of respondents and were disinclined to borrow or stretch financially, yet were more likely (73 percent) than others (38 percent) to have a plan to pay for college. Procrastinators represented 26 percent of respondents and were the least prepared financially and the most likely to have considered not attending college due to the cost.

For the study, Ipsos interviewed 1,601 individuals – 801 parents of 18-24-year-old undergraduate college students and 801 undergraduates – by telephone in the spring of 2014. The margin of error on percentages using the whole sample is +/-2.5 percentage points with a confidence level of 95 percent. The full study and a related infographic are available at www.salliemae.com/howamericapays.

••• behavioral research

Study examines the lies we tell

Can we trust results from a survey about lying?

Perhaps it's a lie told to your parents about how you didn't throw a party the weekend they went away. Or you engaged in a little obfuscation so that successful big brother or sister of yours thinks you're earning more than you are. Or maybe you just can't bring yourself to tell your best friend what you really think of his girlfriend. From white lies to whoppers, there are all sorts of, ahem, not entirely true things which inhabit everyday social interactions. But who are Americans most likely to lie to? And what lies are they most likely to tell?

For a Harris Poll of 2,097 adults surveyed online between July 17 and 21, 2014, respondents were asked which, from a list of topics, they had lied about to each of a selection of people. Overall, the highest percentages of Americans have lied about at least one thing to a parent (43 percent) or a significant other (41 percent). The lowest percentage (32 percent) have lied to a sibling or siblings – though a third still confirm doing so – and in between fall Americans' likelihood to have lied to a doctor (38 percent) or a best friend (36 percent). But what lies are Americans telling to whom?

The same two topics top the lists of lies told to parents, spouses/significant others and siblings – spending/purchases (15 percent, 21 percent and 9 percent, respectively) and sexual experience (14 percent, 14 percent and 7 percent, respectively).

Other top subjects Americans lie to their parents about include alcohol and illegal substance use (12 percent each), physical health (11 percent) and cigarette use (10 percent).

As for lies told to spouses or significant others, other top fibs beyond the one and two spots involve eating habits (12 percent), physical health (10 percent), alcohol use (8 percent) and exercise habits (also 8 percent).

Among siblings, income/salary (7 percent) rounds out the top subjects of deception.

Sexual experience is the top subject Americans lie to their best friends about (12 percent), followed by income/salary (8 percent), political opinions (also 8 percent) and religious beliefs (7 percent).

At the doctor's office, exercise (15 percent) and eating habits (14 percent) are the most commonly fibbed-about topics, followed by physical health (10 percent).

Men are more likely than women to have lied about, well, most of these things – to most of these people. The sole reversal this trend is in lying to best friends about eating habits. There, women (8 percent, vs. 5 percent of men) are the more likely culprits.

Looking at Americans by age, there's little difference when it comes to likelihood to have lied to a spouse or significant other. However, 18-34-year-olds are quickest by far to lie to parents (61 percent), best friends (47 percent), doctors (also 47 percent) and siblings (42 percent).

Are there things you share with some of your closest friends and family but not with others within that same circle? You're not alone. Americans were presented with pairs of figures in their lives and asked whether they agree that there are things they can be honest about with one of them but not the other – your mother but not your father, for example – and vice versa. The biggest "honesty gap" can be found between those who can be honest about some things with their spouse or significant other but not their family (50 percent). Thirty-one percent say there are things they can be honest with their family about but not their spouse of significant other. Women are more likely than men to say there are things they can be honest with their main squeeze about but not their family (54 percent and 47 percent, respectively).

Forty-nine percent of Americans say there are things they can be honest with a sibling about but not with a parent, while 35 percent say the inverse. Four in 10 have things they can be honest about with mom but not dad; 29 percent say the reverse.

Maybe it's a guy thing – men are more likely to say there are things they can be honest with their father about but not their mother (34 percent men vs. 25 percent women).

It's a closer call between spouses/significant others and best friends, with 48 percent saying there are things they can be honest about with their honey but not their bestie; 42 percent say the opposite.

From overdoing it while out with friends last night to not wanting to run into a certain someone at a cocktail party, there are plenty of reasons Americans might want to get out of a variety of engagements. Of course, often the truth is not the most diplomatic approach. But what are the numbers? Nearly four in 10 Americans (37 percent) say they've lied to get out of work, while a third (32 percent) have lied to get out of a social event and roughly a quarter have lied to get out of school (26 percent) or a family gathering (23 percent). Fourteen percent have lied to get out of a date, one in 10 to get out of a religious event or a doctor's appointment and 7 percent say they've lied to get out of a speeding ticket or jury duty (6 percent).

Women are more likely to have lied to get out of a social event (36 percent women vs. 29 percent men), and – sorry, guys – to get out of a date (17 percent women vs. 12 percent men).

Either more people think their fellow Americans are dishonest than they actually are or fewer are willing to fess up to fibbing are actually doing so. Seven in 10 Americans (69 percent) think others lied when taking this poll but only 6 percent raise their hands (so to speak) when asked if they did so themselves.

Depending on your outlook, men (8 percent) are twice as likely as women (4 percent) either to have lied on the poll in the first place (shame on them!) or to have come clean about doing so (good for them!).

Looked at by age group, 18-34-year-olds are roughly three times more likely than their elders to say they lied when taking the poll (12 percent 18-34-year-olds vs. 3 percent 35-44-year-olds, 4 percent 45-64-year-olds and 5 percent among those aged 65+).
www.harrisinteractive.com/newsroom/harrispolls.aspx

••• reputation research

Ethics yes but not at any cost

While consumers care about corporate sustainability, price is still king

Eighty 80 percent consumers believe it is important for companies and brands to behave ethically, however the most significant factors when shopping are price, value and quality.

Research from online sourcing and optimization firm Trade Extensions on U.K. and U.S. consumers' attitudes towards ethics and sustainability and how they affect purchasing decisions suggests consumers display a "Do as I say, not as I do" attitude towards ethics and sustainability in that they recognize its importance but are ultimately swayed by price.

The ethical behavior of companies and brands is relevant to consumers and, when asked in isolation, four out of five consumers regard it as important. But it becomes less so when ranked alongside other factors. When asked to rank the three most important attributes when shopping, the most important factor is price – 40 percent of consumers ranked this No. 1. The second most important factor is value for money – 30 percent ranked this No. 1. And the third most important factor is quality – 16 percent ranked this No. 1.

Convenience is more important for shoppers than ethics, with "easy to find/shop/have delivered" appearing in the top three rankings of 17 percent of consumers compared with ethics appearing in the top three of 12 percent of consumers. Choosing an ethical company or brand when shopping is the most important factor and ranked No. 1. for 2 percent of U.K. and U.S. consumers.

Despite consumers' relatively low ranking of ethical and sustainability concerns, over 70 percent say they are more likely or much more likely to buy from companies with strong and proven policies on sustainability and ethics. U.K. and U.S. consumers also say they are willing to pay a premium for sustainably-sourced and ethically-produced goods and over 60 percent will pay up to 10 percent more. Not all consumers are willing to pay more for ethically-produced goods and of the 10 percent of U.K. consumers who say they will not pay any extra, 73 percent are men.

The opinions of U.S. and U.K. consumers are broadly similar although there are some notable differences. For example, nearly twice as many U.S. consumers, 14 percent against 8 percent in the U.K., say they will never buy a product or service from a company with a poor record on ethics or sustainability. Also, U.K. men are 40 percent more likely not to care about ethics and sustainability than U.S. men. And of the 5 percent of U.K. consumers who do not care about ethics and sustainability, 81 percent were men.

Consumers' opinions also reflect a degree of skepticism regarding companies' communication of ethical and sustainability policies, with only 2 percent of U.K. consumers always believing what companies tell them on these topics and approximately one-third feeling "a lot of companies just say stuff like this to impress but they don't actually do anything."

"It's critical to understand the differences between what people think – their attitudes – and what they actually do – their behavior," says Liz Nelson, a behavior change and research expert. "The fact they say they care about ethics and sustainability is important and it might make a difference given two otherwise equal choices. But this research shows that only a small number will actively go out of their way to act on those feelings. So the challenge for those trying to change behavior toward ethical purchasing is to find what can prompt a behavior change. To do this, businesses have to understand the emotional components of behavior, and that demands they develop a greater understanding of their consumers' attitudes."

The research was conducted by Fly Research during May 2014 and the aim was to gauge respondents' awareness and views of sustainability and ethics issues. The survey was completed by a nationally representative sample of 1,010 U.K. consumers and 1,000 U.S. consumers.

IN FOCUS

Product and Service Update

••• neuromarketing research

Headsets enable neuromarketing data collection during in-depths

IDIs, meet EEGs

South Iselin, N.J., researcher Schlesinger Associates and Interactive Video Productions (IVP), a Morganville, N.J., media company, are partnering to provide an EEG neuromarketing data collection service for in-depth interviews. The procedure is designed to capture the non-verbal emotional responses via brain imaging technology of respondents wearing an IVP MobiLAB headset and to report the emotional traces to the moderator. Post-session, researchers can also log in to a secure online dashboard to access and compare results of their entire EEG neuromarketing study.
www.schlesingerassociates.com

quirks.com/articles/2014/20141004

••• entertainment research

Sony and GMI identify India's music fans

28 segments in 23 cities

Sony Music Entertainment and GMI, a Seattle research firm, have launched the Music India Segmentation Study, comprised of 7,500+ consumers aged 13+ based in 23 cities, each of whom were asked a series of questions around their hobbies and interests, along with their favorite artists, brands, retailers and media outlets. The study has identified 28 consumer segments, given names such as Fanatic, Enthusiast, Casual and Indifferent, corresponding to the importance music has in their lives. The study aims to analyze music discovery patterns across the age groups and the effectiveness of music in marketing and advertising.
www.gmi-mr.com

••• new product research

TRC debuts Idea Mill for product development

Process incorporates game mechanics

TRC Market Research, Philadelphia, is offering the Idea Mill tool, designed to help new product developers and market researchers create 20 effective messages while in the early stages of product development. The process begins with asking the respondents to evaluate a few starter ideas and then asks them to contribute their own ideas. Idea Mill aims to incorporate game mechanics to produce a range of product possibilities and ideas while evaluating them at the same time, ending with identifying the 20 best ideas. The tool can also be used to reexamine existing products. The process takes 10 days or less from start to finish.
www.trchome.com

••• quantitative research

SurveyMonkey Audience goes to Australia

First non-U.S. market with access

SurveyMonkey, Palo Alto, Calif., has released SurveyMonkey Audience in Australia, the first market outside the U.S. with access to the software program. The software is designed to enable Australian companies to target respondents according to key demographics and then survey their preferences and opinions. The company has been recruiting Australian consumer respondents during the past two months by donating 50 cents for each completed survey to a partner charity selected by the respondent.
www.surveymonkey.com/audience

••• social media research

New social network is just for parents

Uses iPhone app

Parenthoods, a San Francisco social network firm, has launched its iPhone app, aimed at creating a social media community for parents. The app is designed to allow users to set up Twitter-like profiles and ask ques-

tions, talk about parenting issues, arrange local meetings or buy and sell children's items from other users. Currently the Parenthoods app is only available for the iPhone and targets the San Francisco area but the owners plan to expand regionally.
parenthoods.co

••• mystery shopping

Mystery worshippers provide feedback on church hospitality

Do newcomers feel welcome?

Faith Perceptions, a research company in Cape Girardeau, Mo., is offering a Mystery Guest Program, aimed at providing market research services to churches wanting to evaluate their hospitality for first-time guests. The program recruits community members who attend services over a period of time and complete a detailed survey. The service can also be used with churches considering capital campaigns or expanding services.
www.faithperceptions.com

••• shopper insights

TouchStore app connects customer to live agent

From in-store to online

TouchCommerce, an Agoura Hills, Calif., Internet firm, is offering TouchStore, a mobile tool designed to connect store shoppers with smartphones to live agents who can provide information on products and promotions. Retailers place QR code signs with explanations of the live chat option and how it relates to a product or promotion. Customers scan the bar code, which then links them to live chat agents on the retailer or brand's Web site. The agents can be provided by TouchCommerce or the retailer.
www.touchcommerce.com

••• location-based research

Nearable stickers make tracking anything possible

Use embedded sensors

Nearables, from New York technology firm Estimote, are stickers containing embedded sensors designed to communicate wirelessly with smartphones. They are designed to provide retailers information on how and when objects are picked up and examined by customers or alert users when they have accidently left a briefcase, purse or other object having the Nearable sticker behind. The stickers are designed to work with existing Estimote analytics software.
http://estimote.com/

••• mobile research

Hall & Partners adds video selfies to YourWord

Enhancement to mobile app

London researcher Hall & Partners has added video selfies to its YourWord mobile app. The new feature is designed to allow members of the YourWord community to film short video selfies as they share responses to questions and marketing campaigns. Going beyond basic demographics, the YourWord community is made up of members who are profiled on attributes such as travel preferences, technology and electronic use, hobbies and interests, retail shopping habits and food and beverages choices. Members of the community can participate in a range of surveys using desktop or the mobile app and get to engage with results through social media and more.
www.hallandpartners.com

••• health care research

Research Now panel targets mental health issues in North America

Europe launch planned for late 2014

Research Now, Plano, Texas, has debuted its Mental Health Panel, designed to provide researchers with a targeted audience of 350,000 respondents in the U.S. and Canada. The participants have been diagnosed with one or more of the following: depression, epilepsy, bipolar disorder, narcolepsy, sleep disorder or sleep apnea, and anxiety. Furthermore, researchers have access to over 20,000 caregivers of patients with Alzheimer's and over 7,000 caregivers of patients with schizophrenia. Research Now plans to launch its Mental Health Panel in France, Germany, Italy, Spain and the United Kingdom by the end of 2014.
www.researchnow.com

•••Briefly

■ Chicago research firm MedQuery has launched QuickQuest, a project management portal for its clients, designed to facilitate communication between

its focus group facility clients and the MedQuery project team. QuickQuest aims to allow the monitoring of important project information, such as incidence reports and respondent profiles and is included in all MedQuery projects at no additional cost.
www.medqueryinc.com/index.php/quickquest

■ Edinburgh, Scotland, research company Jump Research has outfitted a Jump on the Street mobile research van to gather public opinion and customer feedback on the road. The van is equipped with technology to handle quantitative surveys, qualitative in-depth interviews and vox-pop-style video interviews.
www.jumpresearch.co.uk

■ Maxus, a New York marketing agency, has launched Resolve, a planning tool designed to use a proprietary consumer survey to examine sentiment toward media channels. The tool aims to suggest the best channels for companies to use, based on their brands and categories.
http://maxusglobal.com/

■ New York Internet firm Sailthru has added advanced analytics to its software, which is designed to create interest profiles of customers by tracking their behavior on Web sites, e-mail, mobile and social media. The additions are aimed at allowing marketers to target prospective customers, build personalized Facebook ad campaigns and engage customers via Facebook Custom Audiences.
www.sailthru.com

■ Research Now, Plano, Texas, has launched a Germany-based panel for women's health issues. Expansion to the U.S., Canada and the U.K. is planned.
www.researchnow.com

■ Twitter is testing a new service designed to allow advertisers to specify their campaign objectives, measure if their goals are met and pay only for the results they have selected. Users can opt to measure Web site visits, purchases, followers or app installations and the Twitter Ads system will supply the needed counts.
https://ads.twitter.com

■ Software AG, Darmstadt, Germany, has launched the Customer Experience Management Solution Accelerator for Retail, aimed at enabling retailers to combine information on customer preferences and previous transactions with current information as to location, weather and social media. Retailers can then forward relevant offers or instant promotions to targeted individuals.
www.softwareag.com

■ Reston, Va., research company comScore has launched the beta version of Mobile Metrix in Finland. The service is designed to report mobile browser and app audiences on smartphones and tablets, helping media buyers better evaluate advertising opportunities on mobile devices.
www.comscore.com

■ Borderless Access, a Bangalore, India, research company, has launched new panels in Nigeria and Colombia. It also launched a panel in New Zealand, reflecting its new policy of adding panels to provide access to niche segments within developed countries.
www.borderlessaccess.com

■ Germany-based GfK Group has launched the Crossmedia Visualizer, a tool which measures use across media and devices. The tool is designed to help clients understand how individuals use their smartphones, tablets and desktop PCs, providing information on smartphone users and how to target groups based on demographics, media behavior and buying patterns.
www.gfk.com

■ Karchner Marketing Research, Philadelphia, has opened the KMR Research Studio focus group facility.
www.kmrinsights.com

■ London researcher the Kantar Group and 20|20 Research, Nashville, Tenn., have expanded their working relationship to bring the 20|20 Research QualBoard and QualMeeting software tools to all of Kantar's operating companies, along with its training and support services.
www.2020research.com/

■ Citing the need for marketers with analytics skills, Dayton, Ohio, technology firm Teradata has begun offering online educational resources in data analytics through its Teradata University Network. Videos, articles, whitepapers, infographics and assignments are available.
www.teradata.com

■ Opera Mediaworks, a San Mateo, Calif., software company, has opened an Innovation Lab, aimed at determining how future consumers will use their mobile devices. Its immediate goals are developing new products to reach future audiences, including methods to target ads according to individuals' moods or physiological states.
www.operamediaworks.com

■ TokenAds, a Tel Aviv, Israel, marketing firm, has launched Woobi, a service delivering ads to gamers. The Woobi software is designed to identify individual users' preferences during gameplay and then deliver ad content at an appropriate time to avoid interrupting the gameplay. The software also aims to select the ads best suited to the individual's profile and demographics.
www.woobi.com

■ Brighton, U.K., Internet company Brandwatch has launched Twitter Hindsight, which is designed to provide access to a full history of public tweets as well as current Twitter data.
www.brandwatch.com/hindsight

■ Wellington, New Zealand, software company Contact Software has designed the harvestyourdata.com site to handle the data captured by both the ISURVEY and droidSURVEY apps. The move to one site is aimed at improving the user experience by providing industry verticals and more information on product uses and features.
www.harvestyourdata.com

■ New York researcher Ipsos Loyalty has launched Ipsos Loyalty Global Benchmarks, a syndicated study which utilizes data collected since 2004 from Ipsos Loyalty panels. The study is designed to track more than 50 measures of customer engagement for sectors including mobile networks, retail banking, automotive, supermarkets, insurance and energy. www.ipsos-na.com

■ Quantcast, a San Francisco Internet firm, has expanded its Quantcast Measure software with Audience Interests, a feature designed to give mobile app developers information as to their audience's Web history, including Web sites visited and any purchases. www.quantcast.com

■ Google is offering a new service, Website Call Conversions, designed to track phone calls made after a user opens a Web site from a Google AdWords ad. The service utilizes code placed on the Web site by the advertiser to determine if a call was made through a phone link in the ad. The tracking report also indicates which keyword and ad generated the call but doesn't include actual sales or transactions from the Web site calls.

■ Reston, Va., research company comScore Inc. announced the Russia launch of MMX Multi-Platform, designed to provide digital audience measurement and media planning. www.comscore.com

■ Added Value, a London marketing company, has launched Activator, a tracking product designed to integrate data streams of current behavior, marketing forecasts and growth strategies. http://added-value.com

■ Facebook has added a tracking feature to its Web site to enable advertisers to track subscribers who interact with ads on mobile apps and Web sites. Advertisers can view the devices on which customers see ads and the devices on which their conversions take place. A recent study by Facebook showed that more than 40 percent of U.S. online adults begin an activity on one device and complete it on another.

■ Roy Morgan Research, Melbourne, Australia, has devised the audience dollar value (ADV) measurement tool, which merges readership numbers of newspapers, magazines, TV shows, radio stations and Web sites with the dollar amount those readers spend online. Advertising clients can compare the ADV within or across media types for specific consumer product categories. www.roymorgan.com

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

3 principles to maximize the value of qualitative research

| By Sarah Faulkner

snapshot

Sarah Faulkner offers a trifecta of tips for helping qualitative do what qualitative does best.

quirks.com/articles/2014/20141005

Looking to get the most out of your qualitative research endeavors? Consider the following three principles. While each one covers a different area of the process – from setting accurate objectives to fine-tuning your recruiting and nailing the debrief – they all point up the value of careful planning and preparation.

1. Set qualitative objectives for qualitative research.

There's a common misperception that qualitative research is faster, cheaper and easier than quantitative research. There's a vast range of methodologies within each type, so in some cases that is true, but when each is done correctly, quantitative can actually be significantly faster and cheaper than qualitative for many types of research objectives. To know which is appropriate, check your objectives against the three Cs: confirmatory, checkbox and counts.

Confirmatory: If you absolutely must do confirmatory research (research done just to validate something you already are planning to do), a quick quantitative screener will give you an answer much more efficiently than qual.

Checkbox: Avoid just asking respondents which one they prefer or to pick the best option. At the risk of oversimplification, if you want to know "what" or "which one," use quant. If you want to more deeply understand the "why" (and sometimes "how") use qual.

Counts: If you need percentages, tallies or any numerical data at all, you need quantitative research. Don't let anyone cheat by talking about or reporting any statistics from qualitative data – it's just incorrect, misleading and dangerous for decision-making.

Discussion or interview guides should be just that – guides. A discussion guide should be an outline of topics to be covered in an approximate order. Professional moderators should be expert at guiding discussions organically so you get a more authentic view of your consumer while still getting all the research questions answered. If you're doing self- or team-moderation, first ensure that everyone is trained on interviewing basics. This is not a survey checkbox exercise; this is a conversation.

Try putting yourself in the respondents' shoes. How interesting would it be to answer a series of closed-ended questions for an hour? Now back to our researchers' shoes: How much more can we learn by asking for stories, examples and analogies? Not to mention, designing creative exercises that access the unconscious mind and observing actual consumer experiences in real life context.

2. Maximize the value of every respondent.

What does "wasting" respondents mean? It could mean dumbing-down recruitment screeners to hit a certain incidence level for cost reasons and the resulting opportunity cost of an imprecise recruit. It could also mean investing the time to find on-target respondents but not spending sufficient time with them to go beyond surface responses. These two are inextricably linked because to extract the full value from each respondent and make it worth spending significant time with each one requires the investment of time up front to ensure precise and rigorous selection.

First, let's look at the importance of the screener for qualitative research. While it may

be important to talk with a diverse set of consumers, qualitative recruiting, by its very nature, is not meant to be nationally representative. Qualitative research is your opportunity to find the leading edge, the trendsetters, the extreme users, people who absolutely love your product and people who absolutely hate your product. Don't be afraid to use the ends of the scale as criteria! Will it decrease your incidence and drive up costs? Probably so. Will you maximize every consumer interaction because you have something unique to learn from each person (and therefore can recruit fewer respondents overall)? Absolutely!

Next let's look at the value of time spent with each respondent. If you've taken the time to do the perfect recruit and find the exact few consumers you want to talk to, why limit your time to only an hour, a single interaction or a single location? To extract the full learning value from every respondent and gain the opportunity to deeply understand their life context, consider multiple interactions over time. Depending on the objective, this could range from a day-in-the-life ethnography session or an "expert panel" where you engage with a select group of respondents once a week for several months to iterate or co-create. If you're doing a longitudinal interaction, think about how you can keep people engaged between discussions – invite them to participate in an online community, write in a journal or blog or contribute to a Pinterest page on the topic, etc.

3. Translate learning into insights with a well-planned debrief.

Now the research is over and you've just invested many hours observing and listening to consumers speak about your category, products or services and how those things relate to their lives. Rushing out of your research without the diligence of an in-depth debrief session with your team is like spending hours preparing a multi-course gourmet meal, taking a couple bites and then throwing the rest of it in the trash.

Qualitative research and the debrief session that follows should be planned in tandem. Think about the outcome needed and work backwards to purposefully plan the exercises and experiences that will give you the raw input you need to put it all together afterwards. For example, "day in the life" ethnography sessions might be translated into a single story or daily schedule for your target consumer. Or, metaphor elicitation can provide the input for creating archetypes in the analysis session. It takes more time and discipline to plan this kind of research but it's difficult (if not impossible) to get deep, actionable insights without it. It also drives team engagement, yielding diverse perspectives and buy-in for the resulting conclusions and recommendations.

How do you get maximum value from your research debrief? Using listening guides during the research and/or creating analysis templates in advance can be a big help. Consider learning-processing activities like picture analysis (for consumer collages), mind-mapping, creating consumer hierarchies of need or other mental models. Listening is the easy part; putting it all together to actually extract the insights is hard. An experienced moderator with strong facilitation skills can be invaluable for this.

As a rule of thumb, the more concrete and specific the research objective, the shorter the debrief and vice versa. For example, if you're doing a handful of interviews to optimize a specific piece of creative, you can probably debrief in an hour or two. However, if you're doing fundamental consumer segment understanding, gathering inspiration for innovation, or doing in-depth ethnography, consider spending at least half (or even up to 75 percent) of the time spent with consumers doing debriefing/analysis afterward.

Sarah Faulkner is a principal at Faulkner Strategic Consulting, Cold Spring, Ky. She can be reached at 859-240-0200 or at sarah@faulknerstrategicconsulting.com.

case study

••• health care research

A detailed exploration

How research helped Genentech improve its app-based sales-detailing tool

| By Lisa Kumpula and Erin Uyttewaal

snapshot

A multi-pronged research approach – including ethnography, in-depth interviews and survey research – helped biotechnology company Genentech understand barriers to adoption of its iDetail app.

quirks.com/articles/2014/20141006

Analyst firm Forrester predicts that nearly one in five (18 percent) tablet purchases will be made by businesses by 2017. Tablets will increasingly be found in the workplace, especially when work requires being away from the office. Researchers at AnswerLab have already seen evidence of this trend in the financial services industry, where we have observed financial advisors relying on tablets as a portable library of market information and tool for real-time status updates when visiting with investors. Forrester predicts increasing reliance on tablets in particular verticals and points to health care as a prime example.

Leading biotechnology company Genentech seized the opportunity to take advantage of the tablet's portability, ease of use and high-resolution for information sharing in the field. The company's field representatives, called clinical specialists, regularly travel to the offices of health care professionals to share information about treatment options across a variety of therapeutic areas. Genentech first piloted iPad detailing in 2010 to facilitate communication and increase engagement with health care professionals.

Genentech's iPad app, called iDetail, was specifically developed to make the clinical specialists' jobs easier and to make their communication with health care professionals more effective. Genentech found that iPad-detailing early adoption rates were lower than expected across the sales organization, measured by overall Omniture utilization metrics. Based on the hypothesis that iPad detailing yielded more time with customers and improved customer engagement, Genentech's interactive marketing team wanted to understand barriers to adoption and how to make the tool more effective and intuitive. Genentech wanted to evaluate the clinical specialists' experience with the iDetail app to: uncover opportunities to make the iDetail app more usable across Genentech; identify best practices for the next generation of iDetail; and determine the best ways to promote user confidence with the app.

Genentech's iDetail team enlisted AnswerLab for a program of research that included ethnographic research, in-depth interviews in a lab setting and survey research to learn how the app could enhance customer interactions. This article details the methodological approach, the rationale for each stage of research and what the team learned to improve app usability and adoption across the sales organization.

Embrace the new technology

Bringing new iPad technology to a seasoned sales force was an exercise in effective change management. Genentech wanted to inspire field users to embrace the new technology to support customer interactions across the United States.

The team collaborated with AnswerLab's user experience research team to evaluate iPad-detailing strengths and opportunities to improve. The partners recognized that a single methodological approach wouldn't resolve the adoption and usability questions. Given that Genentech operates across multiple therapeutic areas, different brands had unique approaches to app design for specific brands. So the user experience for the app could be quite different depending on which medication information the clinical specialist was accessing. To address this challenge, the teams pursued following research plan:

• An **ethnographic study** consisting of field visits to observe clinical specialists' interactions with health care professionals.

Rationale: The team sought to get real-world user insights, capture the full-range of health care practitioner interactions and identify training opportunities for clinical specialists. During the interviews, the researchers would look for how and when the clinical specialists were using the app content. Because of the variability in the length of the interactions with the health care providers – which could be as little as two minutes or as many as 30 minutes – and the variability of the information provided in the app, the ethnographic approach was recommended.

Approach: AnswerLab's user experience researchers went on field rides with 12 clinical specialists throughout a day of visits with more than 50 health care providers.

Key findings: The observational research revealed that most of the clinical specialists were using the iDetail app in similar ways and in similar situations, across different brands and despite differing levels of comfort with technology. The researchers found the app was most effective for longer, sit-down meetings that spanned a broad range of topics regarding the medication – its efficacy, dosage information, side effects, etc. For shorter meetings, the app was perceived as a complementary resource that was useful for opening a conversation or for addressing a specific question or need that might come up. The study identified key problem areas (e.g., the learning curve; comfort level with technology; navigation and technology issues) that directly impacted how frequently and heavily many clinical specialists engaged with the app. The research also revealed that a few clinical specialists were worried that relying too heavily on the app could hinder development of their relationships with health care professionals or make the interaction feel unnatural and contrived (especially if there were comfortable relationships with health care professionals already in place).

• **User-testing sessions** with clinical specialists and health care professionals in a lab setting.

Rationale: Because of the variability in interactions that occurred in the field between clinical specialists and health care professionals, the teams needed a controlled lab environment to observe the natural flow of a drug detail interaction between the two parties and allowed for specific questions to be asked that may not have come in the field. The lab setting also let the Genentech iDetail stakeholders observe interactions, which couldn't be done in the ethnographic research.

Approach: The AnswerLab research team brought nine health care professionals and three clinical specialists into their labs for 90-minute sessions. The clinical specialists interacted with the providers as they would during a field visit. The researcher observed the interactions and then interviewed each participant with a set of follow-up questions.

Key findings: The user sessions confirmed that the plethora of content and visual aids within the iDetail app were very helpful and allowed deeper discussion to unfold during the drug detail. The study unveiled that clinical specialists required additional training for how to navigate through and utilize the iDetail app as a complementary sales tool. Key usability concerns were revealed as well, things such as areas where the volume of content was difficult to navigate, the touch targets were small or where content was too "busy" to be shown within the app.

• **Benchmark quantitative research** among clinical specialists.

Rationale: The team wanted to use larger sample survey research to validate findings from the qualitative phases of the research, identify best practices for the next generation of the iDetail app and determine the best ways to promote interactivity and functionality of the tablet and the app. Following up with robust quantitative research also determined which qualitative issues (if any) were more prominent amongst the clinical specialists, specifically if there were sample bias issues related to concerns of relying too heavily on the app during meetings, learning curve and technology comfort levels.

Approach: The research team launched a 15-minute online survey that yielded over 300 completions with clinical specialists.

Key findings: Most clinical specialists reported feeling very comfortable using the tablet for work-related purposes and the iDetail app was living up to its goal in certain areas. It was capturing attention with compelling visuals, facilitating meaningful conversations with health care professionals, reducing reliance on paper materials and keeping health care providers engaged with opportunities for greater interactivity. However, certain challenges were preventing greater adoption of the app. The barriers identified were technical issues such as: the app crashing during meetings; effective use of the app required time and preparation which clinical specialists didn't always have between meetings; use of the app wasn't appropriate with some professionals who were resistant to technology or with whom the clinical specialists had developed a close working relationship; the text was sometimes too small; and distributing content from the app was difficult.

• **Round two quantitative research** was conducted among clinical specialists a year after the initial survey. The goal of this round was benchmark metrics (Net Promoter Scores or NPS) across the organization and to track progress over time. The research was also designed to validate key improvements the team had made with their training program and to the iDetail application itself and to further identify the best ways to promote interactivity and functionality of the tablet and the app.

Rationale: The iDetail team sought to confirm they were moving in the right direction with their implemented changes, track progress over time, as well as dig in deeper to the medicine brands to determine areas of opportunity for specific en-


It takes experience to conduct healthcare research *right*.
We have it.
Burke's industry experience and analytical expertise allow us to serve as true research partners alongside our biopharmaceutical clients. They know that no matter how complex the issue may be, we can be trusted to deliver more than just results. We deliver insights.
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hancements at the brand level.

Approach: The research team developed key user experience metrics and started collecting performance by brand through NPS for tracking purposes. They fielded a 10-to-15-minute online survey among more than 400 clinical specialists.

Key findings: The by-brand research approach allowed the iDetail team to rank brands by NPS and focus on learning key problems or frustrations that arose among the lowest performers. While the research revealed that the app maintained its strengths from the first round of survey research and that readability had improved, it also highlighted that technical issues and the challenges of sharing content persisted. Moreover, new challenges were identified with navigation and customizing content.

Empowered the team

Research with AnswerLab empowered the team to apply insights to prioritize app upgrades. The overall goal of this work was to identify opportunities to evaluate intuitive navigation, app utility and overall user comfort with using the iPad to share new therapeutic information with customers.

The combination of quantitative and qualitative research methods throughout this research program gave the Genentech team the confidence to know they were focusing on the core areas to improve app usability that persisted across all brands, as well as the detailed reasons why and how to address intuitive app navigation.

Genentech used the findings from this research to inform the creation of an approach to application development and refinement during which it will measure three key components over time: intuitive navigation, user confidence and NPS.

Intuitive navigation: The results revealed the need for design guidelines such as font size and location of prescribing information and safety information to promote consistency across brands in the app. The iDetail team also decided to evaluate Apple's Human Interface Guidelines to guide app design best practices.

User confidence: The research highlighted the need to incorporate additional training with the clinical specialists on the content provided within the iDetail application, the functionality of the tablet itself as well as how to most effectively use iDetail to engage with health care professionals. Specifically, new training efforts focused on using technology to build user fluency and confidence with tablet detailing.

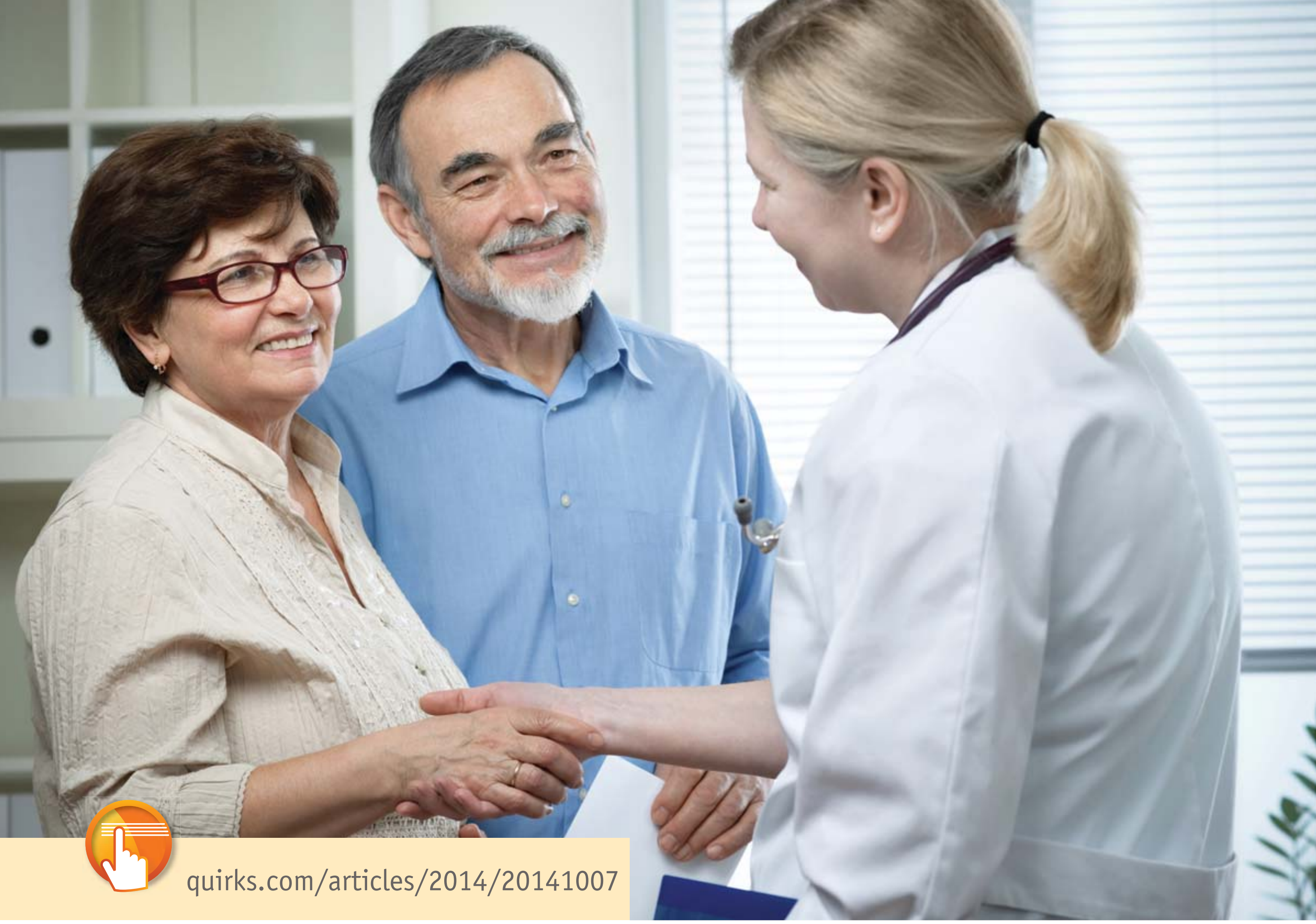
Net Promoter Score: How likely is a clinical specialist to recommend iPad detailing to a colleague? Based on results of this metric, Genentech can assess the sentiment of promoters vs. detractors of the new technology. The goal is to continue to improve the NPS across field users over time so that the interactive marketing team can develop iPad detailing tools to meet field user and customer needs.

The findings from the program of research and the changes they drove had a direct impact on the objectives of the iDetail app. The iDetail team was able to: increase engagement during field visits with health care professionals; increase clinical specialists' adoption of the iDetail app; increase frequency of use; and decrease sales reliance on print materials.

A broader impact

Beyond improving metrics for the app, the research findings had a broader impact on the organization. They provided case study examples for using an interactive teaching tool and helped illuminate how teams use technology. They shed light on what type of information and what kinds of interactions are better suited for iPad-based detailing versus paper informational materials. Importantly for a company like Genentech, where R&D is critical, the research created an environment for innovation and established a baseline by which to measure adoption of new technology and the piloting of new features and content.

Lisa Kumpula is UX research director at AnswerLab, a San Francisco usability research firm. She can be reached at lisa@answerlab.com. Erin Uyttewaal is senior manager, interactive marketing at Genentech, a San Francisco biotechnology firm. She can be reached at erinuyttewaal@gmail.com.



••• health care research

Patients don't go it alone

The role of the caregiver in health care market research

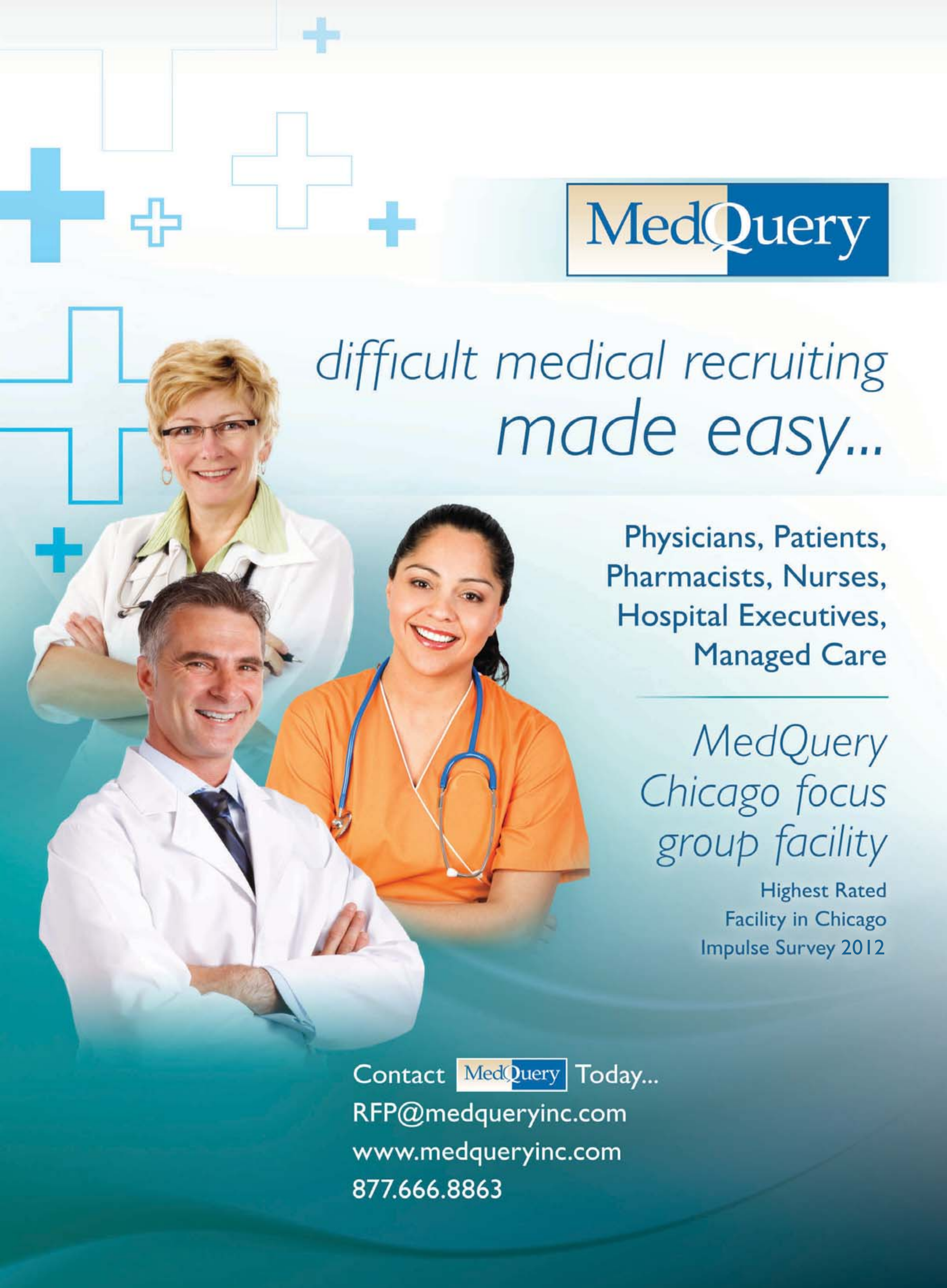
| By Jennifer Gold

snapshot

Researchers in many other industries solicit the input and perspectives of those inside their target consumers' spheres of influence. It's time health care and pharmaceutical marketing researchers did the same.

Most industries recognized long ago the value in learning from those who best understand and influence their consumers – in other words, the consumer's friends, family members and peers. Friendship circles, mommy groups and interviews with married couples have for years provided consumer goods, technology and financial services industries deep insights into the drivers of decision-making. A group of friends engaged by a moderator, for example, quickly identify their ulterior motives for making emotionally-driven purchases during a shopping excursion, thereby isolating the underlying reason for a splurge outside the predetermined price range. In another instance, a husband and wife who debated their retirement plans with a market researcher promptly delved into the emotional quagmire of family spending – a factor which lies at the heart of retirement planning and investment decisions.

Each year, the pharmaceutical industry spends well over a billion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dollars on market research in the U.S. alone[1] – most of it on health care providers (HCPs) and consumers. In particular, industry leaders have conducted in-depth research into the role of physician as decision-maker and patient as consumer.

As economic pressures in the U.S. health care system continue to increase, HCPs have less time to make thoughtful treatment decisions about each individual patient's care. This, in turn, puts a greater burden on patients,[2] who are sometimes ill-equipped to make complex decisions.

It is well-documented that patients find it difficult to digest information in the physician's office – especially at the time of diagnosis.[3] Even so, many market researchers don't see this as a challenge and assume a patient will be able to be an active and informed decision maker once they recover from the initial shock of diagnosis and become more immersed in their disease.

As it turns out, however, patients are less likely to recall information

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related to the disease when the news or information is perceived to be even mildly negative.[4] Even when only at risk, a patient's recollection of relevant information decreases as they start to associate themselves with the risk group. For example, women at risk for breast cancer have trouble recalling information on breast cancer prevention, because they feel threatened about one day having breast cancer.[5]

As market researchers, we presume that a patient's ability to recall events and information improves over time. This is not only incorrect – it seems to be the complete opposite.

Bringing a caregiver's perspective into the equation, however, changes everything.

Emotional and physical support

Patients need emotional and physical support from their caregivers at each stage of the journey – from diagnosis to ongoing compliance and, in some cases, end-of-life decisions. A caregiver, such as a spouse, adult child, parent or friend, is chosen by the patient and brought into his or her most inner circle. They accompany the patient to doctor visits, conduct desk research on behalf of the patient, keep track of concerns and make pharmacy trips to fill prescriptions. In addition, they offer support and provide researchers a more accurate account of events, challenges and emotions involved throughout. Although a caregiver is closely connected to the patient, they do not self-identify with the affected group which, as identified earlier, can be a major barrier in accurately recalling information.[6]

To ultimately understand the patient, it is important to recognize the power of caregivers as research subjects, for they offer a rich and honest perspective of the patient and are active and often unbiased participants in the patient's health journey. It should also be noted that the caregiver can also represent a powerful promotional channel and have incredible influence on a patient's decision to seek care, choose a provider or manage a therapy.

Our firm, ZS Associates, recently reviewed impactful qualitative research across the company and found that several standout health care projects included a caregiver in the research sample. Some of these projects involved caregivers in standard situations with patients who were elderly, very young or were incapacitated and who could not easily make decisions. Others were more atypical situations in which it was assumed that the patient could recall and make all health care-related decisions.

In one instance, ZS grouped caregivers in a broad sample alongside primary care physicians, specialists, nurses and patients to understand the complex journey of a patient in a chronic and sometimes debilitating condition. The research objectives were to pinpoint the drivers and barriers each stakeholder faced in the decision-making process in order to identify and influence the ultimate adoption of the client's new product.

A major insight into the project was related to timing – how early in the journey did the caregiver help the patient and at which subsequent times did the patient interact with various HCPs? We found that the patients were unable to accurately recall the timing and series of events and the HCPs used inaccurate information reported to them by the patient in the initial consultation. Only the caregivers were able to remember the important who, what, when, where and whys of patient and HCP interaction.

In another project on a rare disease therapy for adolescents, researchers focused exclusively on the very-involved caregiver parents to identify unmet needs and design programs for both parents and their children through co-creation activities. The ultimate goal of the project was to create and prioritize support programs. In this case, the parents were recruited into an online open forum in which they could share their experiences and ideas. Surprisingly, the research found that the parents – through their interactions and support of each other – identified unique ideas for their children based on challenges many of them faced. The caregiver parents identified the need for an online support group for the children themselves as they learned to overcome challenges associated with their condition.

In addition to classic research approaches, such as qualitative and quantitative market research, several new tactics are available to consider – a perfect example being social media. At the advent of social media big data sources, most market researchers expected to find information from stakeholders they are used to studying, i.e., the physician and patient. However, in retrospect, it may not be surprising that one in three posts about breast cancer in social media channels are from caregivers and not patients or physicians.[7]

Target patients and caregivers

Several well-studied promotional campaigns target not just patients but also caregivers. This, for example, includes big-brand erectile dysfunction pharmaceuticals – which target spouses – and Kaiser's "THRIVE" campaign, which encourages patients and their caregivers to select an integrated delivery network based on the support received by both parties.[8] Even recent contributors to *Quirk's* have identified the influence of caregivers on patient research.[9]

When designing a market research study, it is important to remember that the caregiver offers crucial and sometimes less-biased insight into understanding the patient; insights that drive marketing decisions for patients and HCPs. Increased recognition of the caregiver community and involvement of caregivers in online forums provide a rich source of information to be studied.

For a strategic marketer, the caregiver is becoming an important stakeholder with associated stresses and challenges in helping to manage a loved one's disease. An estimated 36.5 million households in the U.S. contain a caregiver who has been in their role for an average of 4.6 years.[10] A Web search for "caregiver support" yields 5,040,000 results and a search for "caregiver burnout" yields 453,000 results, indicating a significant unmet need in this important group.

We believe that several trends will increase the importance of caregivers to provide a patient perspective:

- a shortage of HCPs, including primary care physicians and nurses, relative to the aging and increasing population;
- the role of decision maker being increasingly handed over to patients by HCPs;
- an aging population that drives the need for increased caregiver involvement;
- a growing online community of caregivers who reach out to each other for support and information; and
- increased research and interest in the area of caregivers and caregiver support.

Do not take their journey alone

As the health care industry continues to understand the patient as a consumer, it is important to recognize they do not take their journey alone – the caregiver has been invited and will continue to join along for the ride. Shouldn't we ask the caregiver what the ride is like? Eventually, we might be equipped to offer them a map, extra legroom and snacks for their journey.

Jennifer Gold is a customer insights manager in the San Mateo, Calif., office of consulting firm ZS Associates. She can be reached at 650-696-8896 or at jennifer.gold@zsassociates.com.

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[9] "The words they live by: how a 360-degree research approach provides deeper understanding of the patient experience." Jim Hickey. http://www.quirks.com/pdf/201403_quirks.pdf.

[10] caregiving.org.

customer experience research

A new currency

Drivers of customer satisfaction are changing and banks must change in response

| By Sheri Petras

snapshot

Drawing from results of an annual study of bank satisfaction, author Sheri Petras illustrates how technology and communication are increasingly key factors influencing bank customer experience.

The banking landscape is fundamentally changing. Fewer customers are entering branches and the numbers will continue to shrink. In addition, tighter federal regulations make it more difficult to offer new products. In this new environment it has become a major challenge for banks to build trusting relationships with customers.

The good news is that bank managers committed to securing, maintaining and improving customer satisfaction have new data-driven insights to inform effective customer engagement strategies. An analysis of data from CFI Group's 2014 Bank Satisfaction Barometer (BSB) reveals three critical drivers of bank customer satisfaction: the emphasis customers place on the role of the bank branch has changed, indicating branch locations have less impact than in the past on overall satisfaction, yet still influence customer acquisition; strong communication and information exchange by banks to customers is a distinct competitive differentiator; and customer adoption of online and mobile technologies is driving banks to innovate.

CFI Group launched its first BSB in Q3 of 2013. The BSB model looks at seven key drivers of customer satisfaction: products and services; information and communications; branch staff; branch convenience; ATMs; rates and fees; and online and mobile banking. Conducted using the patented methodology of the American Customer Satisfaction Index (ACSI), the BSB calculates an "impact" for each satisfaction driver as an indication of what relative return on investment banks can expect in terms of increased customer satisfaction (BSB score) when investing in a particular area.

(The initial BSB study in Q3 2013 leveraged the ACSI methodology to secure detailed information from 500 customers of banking institutions of all sizes, across the country. At the end of Q2 2014, CFI Group again studied a similarly-sized group of bank customers to secure additional – the most recent – benchmark data that can be used by the banking industry at large.)

The 2014 BSB's analysis of these key drivers suggests necessary changes in the strategies banks use to interact with their customers. Having a strong understanding of

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how these changes impact satisfaction will position banks to stand out from the competition.

These three findings necessitate that the banking industry take notice and take action:

The relationship between customers and bank branches is changing. The introduction of U.S. branch banking in the early 20th century made it possible for smaller banks to expand; at the same time, it enabled national brands to establish a brick-and-mortar presence in local markets. While the location of the branch and the quality of the service customers receive is important today, according to BSB findings, it is less central to the customer experience.

More than a quarter of bank customers surveyed said they were already using their bank branches either somewhat less often or significantly less often than they had in the past. Only 17 percent admitted to using the branches more often and 52 percent said their usage was about the same. When asked about the future, most customers (60 percent) did not expect their branch usage to increase, while 25 percent expected it to decrease. Only 15 percent of respondents reported that they expect to visit their bank branches more often in the future.

How much are bank customers using these branches today? The survey revealed that the days of the weekly branch visit are long gone. Thirty-six percent of customers rarely, if ever, visit a branch and are at risk of being lost to online-only banks. Only 37 percent of customers are visiting a branch more than once a month. As compared with historical data, 31 percent are using the branch less often than three years ago.

Despite the decline in usage, customers value the fact the branch is there for them to handle business they can't (or prefer not to) handle online or via ATM. When asked how important the branch location was to the bank customer, 64 percent said it was either important or very important. Another 26 percent said it was moderately important. Only 10 percent of bank customers reported the branch location was of little or no importance. Further, 68 percent of respondents stated their closest bank branch was no further than three miles from their home.

The local branch still plays a key role in attracting new customers, even as it plays a shrinking role in retaining existing ones. Of the reasons customers gave for choosing to do business with a particular bank, the greatest factor was convenience of the location. According to the BSB data, nearly 40 percent of new customers in 2013 came to the bank for this reason. While that number fell to 35 percent by 2014, satisfaction with branch convenience still rose a point on the index from last year, rising from 84 to 85. Last year's BSB revealed that the branch personnel accounted for 28 percent of the variation in customer satisfaction. This year, that number had fallen to just 16 percent.

Information and communications from banks provide major opportunities for banks to differentiate themselves. Just a few years ago, high interest rates for banks' deposit accounts and low interest rates for their mortgage loans were key drivers of customer satisfaction. That has shifted. In response to uncertainty regarding new rules for many bank products, the

erosion of customer trust in financial services companies in the wake of the financial crash and concerns about privacy and security in general, customers are more sensitive to information and communications from their banks. All other factors being equal, a financial institution that does not seriously meet customers' needs for information and communication will perform at a lower level than competitors.

In fact, according to the most recent data, this driver of satisfaction has three times more leverage on customer satisfaction than it did just one year ago. No other BSB variable changed as much during this period. It's also important to note that younger customers, who are more likely to rely on mobile and online tools, are less satisfied with the quality of information and communications provided by their banks. Customers under age 35 score performance in this area at 81 (out of 100) versus a score of 88 from customers 50 and over. Meeting the needs of younger customers in this area is important for attracting loan business (e.g., automotive loans or first-time home buyers).

While a more complicated banking environment and concerns about security are key reasons for this change, an improving economy is having an effect as well. This variable is sending customers back to the market and in search of additional credit. Understanding that there is a need for clear communication and more information to ease tension in an increasingly complex environment, it was no surprise that the 2014 BSB study found that this was the most significant driver of overall customer satisfaction.

The importance of online and mobile banking continues to rise. As reliance on the branch declines, online and mobile banking offerings are now among the most significant drivers of overall bank customer satisfaction. Customers expect the bank to offer them online methods of transacting business and they expect those methods to be convenient, reliable and easy to use.

The influence of online and mobile on satisfaction has increased 27 percent since 2013 and has eclipsed branch staff in its relative leverage on satisfaction. Customers of all ages have made Web-based banking a way of life, with 86 percent of those between ages 18-49 doing at least half of their banking remotely and 76 percent of those ages 50 and over doing so. For an increasing number of respondents, that means using the bank's mobile app. Usage reached 36 percent this year, up a point from 2013. The most often used remote banking service in 2014 was to check account balances. More than half of all respondents (52 percent) say they check account balances remotely. Thirty percent said they checked their balances at least once each week using this method.

While the satisfaction score for online banking and mobile apps only rose one point between October 2013 and June 2014 (increasing from 86 to 87), the impact of this driver jumped from 19 percent to 25 percent. This makes online offerings an imperative for banks going forward.

However, even though bank customers are increasingly embracing online offerings, the fact that the bank offers these products and services does not yet appear to be a reason for

a bank customer to begin doing business with an institution. It does not seem likely that banks will win more clients just by building online offerings as only 3 percent of respondents said they chose their bank based on its Web site or mobile app.

Still, this trend should not be overlooked. The importance of online and mobile banking as a driver of customer satisfaction has risen by six percentage points since last year. Taken together with the increase in the customer's desire for information and communications, these two drivers now account for more than half the variation in customers' satisfaction. Last year, they accounted for less than 40 percent.

Remains a key driver

The bank branch remains a key driver of new business for the bank but once these customers arrive, the branch has little impact on their satisfaction going forward. Even the branch personnel, who have historically been a major driver of satisfaction, are now less salient to the customer. While physical branches still play a significant role in customer acquisition, an investment in them with the expectation of driving increased customer satisfaction would deliver low returns. In general terms, the BSB model tells us that the physical branch is generally meeting customers' expectations today.

As online and mobile banking become more widely accepted and are able to facilitate a broader variety of transactions, customers' need for bank branches declines. But with customers visiting branches less frequently – and face-to-face contact reduced – the need for effective information and communication becomes more critical.

Of the seven drivers of customer satisfaction CFI Group tracks in the banking industry, none changed as much, year-over-year, as the customer's desire for information and communications. Banks that do a good job of providing the information their customers require will see higher levels of customer satisfaction in the year ahead and reap the benefits this brings their institutions.

Banks are therefore urged to provide clear, relevant and timely communications to their customers, not just regarding bank products and services but about all aspects of their customers' financial lives. This may be banks' best opportunity to differentiate themselves from their peers. Understanding the needs of different customer segments is important with younger customers more focused on digital technology and communications.

Finally, banks must invest in the future with online and mobile tools that will empower their customers. Customer adoption is widespread and survey respondents were very clear in the significant impact these services have on overall satisfaction with their bank. Based on the research findings, it is clear that bank management cannot ignore the importance of these offerings to their customers.

Sheri Petras is CEO of CFI Group, an Ann Arbor, Mich., research firm. She can be reached at spetras@.cfigroup.com.

●●● customer experience research

Times have changed

The new normal of consumer behavior and how to respond

| By Alton L. Adams

snapshot

KPMG's Alton Adams explores the current landscape of consumer habits and preferences and details the facets and capabilities that companies must possess in order to keep pace.

After years of focusing on cost management, companies have pivoted with a renewed focus on growing the business. And they face a new landscape of consumer attitudes and behaviors – one that is vastly different from before the Great Recession.

In this new normal, companies are looking for answers to important questions. For example, how can they engage most effectively with consumers? How can they create a customer experience that drives acquisition and loyalty? What core marketing capabilities do they need – today and in the future – to secure their position and take share from competitors?

It comes down to understanding the new normal of consumer behavior – and navigating it with the right brand vision, customer insights, multichannel engagement and technological agility.

Measurable changes in consumer behavior

Consumers play a critical role in the economy, accounting for 70 percent of gross domestic product in the United States and 18 percent worldwide. And these consumers are acting differently compared with their behavior before the downturn. Here is the new normal:

Consumers are much more judicious in their spending. As consumers struggle with lost home equity, fragile employment and slowing growth in their 401(k) plans, they have downshifted from conspicuous consumption to considered purchases. In fact, the New York Federal Reserve Bank reports that consumer debt is at its lowest point since 2006, as Americans step back on their purchases. Consumers' fluctuating confidence in the economy means spare cash is often being saved, not spent.

Consumers are empowered and informed. With the downturn came the growth of the social consumer, who is smarter and more aware of product options than ever before. Gone are the days of simply reacting to advertising messages. Today, whether they are buying a car, a service or a meal, consumers throughout the world are more likely

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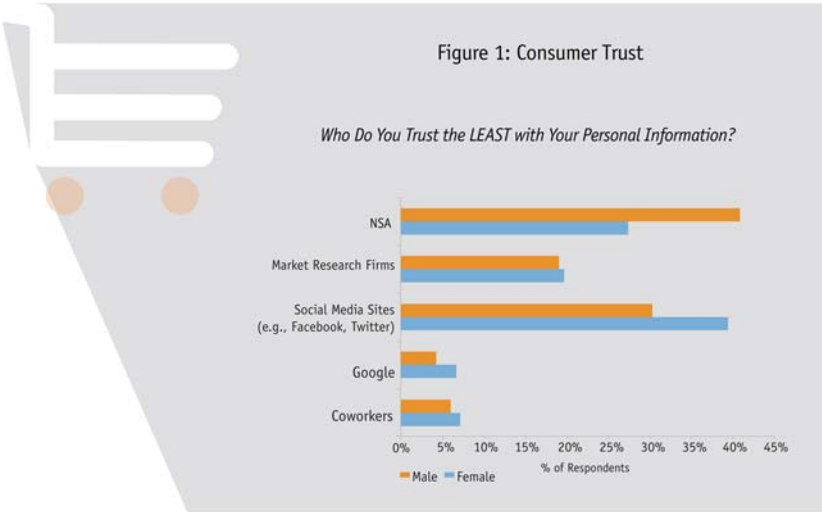

Figure 1: Consumer Trust

to consider user reviews – through social media, online forums, comparison Web sites and other Internet research – as part of their decision.

For example, in a 2014 survey of nearly 2,000 Americans, 79 percent said they at least sometimes check reviews before purchasing a product or service and more than half said they have submitted a product review on a Web site.[1] In the United Kingdom, similarly, more than 88 percent of consumers are influenced by other consumers' online comments,[2] while in Australia, 60 percent of shoppers use the Internet to research purchases.[3] Furthermore, the global 2013 Edelman Trust Barometer shows that consumer trust continues to shift from institutions to individuals, with "a person like yourself" ranking high as a credible source of information.

How can you help consumers feel more empowered? According to research[4] by Luc Wathieu, deputy dean at Georgetown University's McDonough School of Business, consumers may feel more empowered when they have: control over the composition of their choice set, such as the number of alternatives they are considering; the ability to frequently assess their satisfaction with the process of making a choice; and information about other consumers, including their frequency of using the product under consideration.

Power has also shifted to the consumer in terms of switching costs. Years ago, for example, consumers who wanted to sell their car typically went to their dealer but today they have many more options. In the wireless market, similarly, customer loyalty is not as sticky as it once was, as switching costs have declined due to a saturated market with more options for customers.[5]

Consumers are more distrusting of large institutions. Just as consumers increasingly trust the opinions of other consumers, they decreasingly believe the messages of large companies and government organizations. This distrust is due in part to the shock of the financial crisis and subsequent misdeeds in the marketplace, such as banks' attempts to charge ATM fees or some companies' proposed "convenience fees" for online payments.

According to the 2013 Edelman Trust Barometer, less than 20 percent of the general public trust business leaders and government officials to tell the truth. The influence once held by these traditional authority figures is shifting to fellow employees, peers and experts.

Similarly, a survey by Forrester Research found that only 15 percent of adults in the United States trust digital advertising such as social media posts, Web ads or text messages: "Simply put, consumers are more trusting of content they can find on their own terms, rather than that which is pushed out to them by brands."[6]

According to the Georgetown Institute for Consumer Research (GICR), consumers tend to have a fairly strong preference for underdog brands. Accordingly, when large brands are perceived as competing with small brands, consumers tend to favor the small brands. However, these tendencies can vary depending on individual consumers' personal identification as an underdog and their perception of the company's willingness to overcome external hardships.[7]

Consumer distrust of large institutions can vary by gender and type of institution. In a poll by the GICR (Figure 1), men were much more likely than women to select the National Security Agency as their least-trusted organization. Meanwhile, women trusted social media sites less than men. Marketing researchers, take note as well of the presence of MR firms on this list.

Consumers value corporate responsibility. Amid widespread distrust of companies, today's consumers, especially Millennials, are increasingly sensitive to companies' focus on environmental sustainability, community support and other forms of corporate social responsibility (CSR).

In fact, according to a global study of 10,000 citizens, more than 85 percent consider CSR when deciding where to shop, what to buy or which products and services to recommend to others. The study also notes that as social media provides unprecedented access to information about corporate behavior, nearly two-thirds of global consumers use social media to engage with companies about CSR.[8]

Despite the increased focus on CSR, however, GICR research also indicates that consumers are willing to overlook ethical transgressions when considering a product they really want and when they can internally rationalize their purchase.[9]

A different world out there

Add it up, and it is a different world out there. Consumers have changed many of the ways they make decisions about products and services. They are juggling a combination of less money, more information and more skepticism about brand messages.

So how will you respond? When it comes to navigating the new normal, successful enterprises execute several things well:

Clarity of purpose. What is your brand promise and how well are you delivering it through your brand experience and communications? In a world where consumers are inundated with brand messages, the most successful companies are relentless in understanding their customer, the value proposition and how to deliver it.

Entrepreneur magazine, for example, notes that some brands combine "exceptional product accessibility, functionality and customer experience" to create a strong brand that consumers trust. In some cases, these brands have such a strong brand experience that no matter what product they introduce, consumers trust that it will be smart, sleek and life-improving – and, even more, they will enjoy the experience of making the purchase.[10]

Other brands, from retail to air travel, are widely cited in textbooks and industry journals for their differentiated customer experience. Some of these brands embraced customer relationship management early on, taking the time to understand their customer, articulate the value proposition and distribute the information to the workforce that is delivering the experience.

According to the GICR, consumers define clarity of purpose as "simple marketing messages that don't make too many claims." In fact, the research goes on to say that consumers evaluate a brand most positively when it makes exactly three claims. Any more or fewer than that and clarity goes down.[11]

Data integration. A critical part of understanding consumers is collecting and disseminating the right data, including structured data (such as transaction records) and the massive amounts of unstructured data (such as online comments, brand sentiments, and social media likes and dislikes). How do you combine new information with what you already know in order to learn more about your customer – or, in some cases, to discount what you think you know?

One large hotel company, for example, creates personalized experiences – such as preferred beverages in the room or special offers upon check-in – based on the integration of social data and clickstream data from customers and like-minded travelers. According to *The New York Times*, the company also integrates social-media behavior with promotions: When one customer used a mobile app to check-in at a hotel, she received 250 points for her loyalty account. When she used the app again at the bar and hotel spa, she got a second drink free and a spa discount.[12]

Some amusement parks, similarly, are introducing new technology to monitor park visitors' behavior and collect information on personal preferences, so the parks can refine their offerings, customize marketing messages, and increase sales.[13]

Analytics. In addition to collecting the right data, it is important to convert it into actionable insights – and then distribute those insights to anyone who is touching the customer. Using regression analysis, artificial intelligence tools and even basic indicators like moving averages, leading companies continually refine their results and feed them back to different levels of the customer-service organization. It comes down to learning who your customers are, how to serve them and how to keep them.

The collection and analysis of consumer data are about understanding your customers' behavioral, attitudinal, demographic and financial information. That is, how do your customers interact with your company? How do they feel about your company? How old are they and where do they live? Are they profitable? Based on this kind of analysis, you can create a customer profile, segment your customers and develop the right marketing strategies.

When it comes to segmentation, GICR research suggests that there are two different types of consumers: frequent buyers, who tend to buy a particular brand out of habit or convenience, and fiercely loyal buyers, who buy a particular brand because they have a strong allegiance. Unlike frequent buyers, fiercely loyal buyers tend to have negative emotions toward competing brands and they are far more willing to defend, forgive and recommend their favored brand. With the right use of analytics, you can identify these fiercely loyal consumers and turn them into brand champions.[14]

Multichannel mastery. The average consumer is exposed to thousands of marketing messages each day, which is why it is critical to understand how, when and where your customers want to be engaged. As consumers increasingly expect an efficient experience, are you managing your customer experience across all channels? For example, are you integrating digital communications with telephone, print and brick-and-mortar stores?

Some companies are using location-based mobile marketing as a key channel. For example, based on your customer data, you may know that if a customer is within 10 miles of a store, you can get him in by sending a 10 percent discount to his mobile phone. If he is within five miles, likewise, you can attract him with a 5 percent discount. Multichannel mastery comes down to delivering the right message to the right customer at the right time and in the right way.

Technological agility. Finally, a key consideration for managing the new normal is technology. Leading companies have a flexible architecture that enables them to quickly respond to the changing consumer landscape. With an eye toward cost of ownership, these companies are exploring nimble, cloud-based technologies for customer relationship management, leaving behind the days of on-premise CRM systems with long implementations.

In addition, it is important for all of your tools to fit together in a cohesive strategy. For example, how do you integrate your attitudinal analytics tool with your software-as-a-service modeling tool? How do you interface those with your cloud-based CRM application so you can share insights with your sales force? Ultimately, technology is the great enabler: If you do not get it right, you may struggle to execute everything else.

Higher expectations, lower tolerance

In the past half-decade, consumer behavior has changed profoundly, creating customers who have higher expectations – and lower tolerance when those expectations are not met. And when it comes to acquiring and retaining these customers, the implications are significant and evolving. The companies that succeed will establish the appropriate insights and engagement capabilities to stay in tune with the new normal.

Alton L. Adams is principal – national lead partner, customer strategy and growth in the Atlanta office of KPMG LLP. He can be reached at 404-614-8614 or at aladams@kpmg.com.

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[6] MarketingCharts, "Few consumers trust social media marketing, Internet ads," March 25, 2013.

[7] GICR Research Brief, "Consumer response to underdog branding," Issue 15.

[8] 2013 Cone Communications/Echo Global CSR Study.

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[10] *Entrepreneur*, "Secrets of the 10 most-trusted brands," March 20, 2012.

[11] GICR Research Brief, "Rule of three: when three charms but four alarms," Issue 25.

[12] *The New York Times*, "The 'smart' trend in hotels," April 22, 2013.

[13] *The New York Times*, "At Disney Parks, a bracelet meant to build loyalty (and Sales)," January 7, 2013.

[14] GICR Viewpoint, "Finding the fiercely loyal among the frequent buyers," January 27, 2014.

customer experience research

Meet them where they want to be

Why it's important to give customers choices of ways to contact you

| By Crystal Collier and Gavin Winter

snapshot

The lure of relying on Web-based customer-contact methods is strong for brands and companies but sometimes customers just want to pick up the phone to solve their product or service problems. Thus, the authors argue, companies must offer customers a range of ways to interact with them.

Pundits continue to argue over the precise meaning of the latest buzzworthy term to hit the customer experience (CX) world: omni-channel. But one thing's for sure: The customer is unquestionably in the driver's seat when determining the tasks or actions they want to perform. They also decide when and where in their customer journey they want to perform them, using the channel or technology of their choice.

It has taken decades for companies to embrace a broader notion of CX that crosses the Rubicon of the brand promise touted to consumers by marketers trying to acquire them and to customers by service delivery channel operations trying to retain them! We will refer to them as customers throughout their journey.

The fact that customers can and do flit between channels as they move along this continuum is really forcing the omni-channel issue. A primary reason for this is that the technology to understand and engage customers, as well as deliver service interactions, is now commonly available to customers and companies alike.

But herein lies the challenge to the current practice of so-called omni-channel: Just because it's technically possible to manage customer interactions through self-help and social doesn't necessarily mean it's desirable. The key point here is customer choice.

Social media provides customers with a voice that must be proactively managed. The inexorable shift toward chat and self-help service channels will continue – driven by general familiarity (desensitization) regarding their use and the emerging influence of key (younger) demographic groups.

Coupled with this is the underlying and powerful business driver of perceived cost efficiency in their use. As machine-to-machine technologies (particularly mobile and app-based services) continue to wholly or partially replace human-to-human interactions, companies and brands have fewer real opportunities to connect at an emotional level with their customers. More likely, they will have just introduced more opportunity for technology disconnects

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with the resulting frustration requiring "someone" to sort it out.

There is no escaping the fact that emotional engagement is the foundation of any brand and it's been long established that it is key to delivering a differentiated brand experience. How companies manage their service interactions, particularly at key moments-of-truth, can deepen customer engagement and drive loyalty. It's easy to see how activating these emotions can be done in a phone interaction and more difficult in e-mail, chat and self-service!

Ill-prepared to offer alternatives

When it comes to service interactions, clear and present danger exists in companies prematurely pushing customers away from their channel-of-choice before they are ready and in being ill-prepared to offer alternatives and manage them effectively. While preferences are slowly changing (particularly with Millennials and Generation Z), for the moment and the foreseeable future, the contact center remains king for most customers (with the most disposable income).

Table 1

	Rank	Offered	Ability to Get Issue Resolved	Time to Resolve Minutes	Very Satisfied
Phone	1	50	86%	16	58%
Chat	2	29	70%	9	40%
E-mail	3	41	44%	744	22%
Facebook	4	48	27%	196	17%

So, companies should take heed if they don't want to miss out on the intrinsic benefits that well-managed contact center interactions offer as far as providing defining and brand reaffirming experiences.

In late 2013, CX Act undertook extensive research across 3,000 customers in the U.S. and published its findings in Touchpoints: Personal Presence Trumps Digital Decorum for Optimal Customer Experience. Our research showed, confirmed and amplified these observations: while only half were satisfied with their first interaction, personal touch prevailed, with satisfaction highest for those who contact in-person and lowest if done via social media.

As a matter of interest, one in five shared their experience via social media and among those, Facebook dominated over Twitter by a 4:1 ratio but Twitter followers are more engaged.

In 2014, we took a deeper look into the subject by conducting what we called a Customer Touchpoint Stress Test across 50 major brands and multiple sectors. We looked at how they performed on customer satisfaction with contacts across four different channels: phone, e-mail, chat and Facebook. Customers of the companies tested were recruited to evaluate service offered when contacting on simple issues such as billing questions and product inquiries.

The first headline was that companies just aren't making it easy for customers to initiate contact in the first place. Only 52 percent of the testers found the customer-care contact information on their Web site very easy to find and only 24 percent found the information extremely helpful.

As shown in Table 1, phone was the highest-performing channel, with an 86 percent resolution rate and 58 percent of testers being very satisfied with the resolution. But even high-performing companies on phone did not fare well with other channels, with less than half of the testers obtaining resolution and only about one-fourth being very satisfied with the response.

Surprisingly, since this is not a new channel, e-mail response fared very poorly, with only 44 percent receiving a resolution and only 22 percent very satisfied with the response.

CX Act's previous research showed that access is crucial and that making it difficult for customers to contact companies with questions or complaints can lead to fewer contacts, leading to lower customer satisfaction and loyalty. The same research also showed that contact-handling can be a profit center due to dramatically higher loyalty created by the positive contact-handling experience.

The stress test confirmed this, showing that once the contact is initiated, the customers' experiences strongly impact their loyalty. Having a positive contact experience resulted in testers being 15 times (94 percent versus 6 percent) more likely to say they would definitely buy again than those having a negative contact experience.

Key takeaway: engage and show empathy

There will undoubtedly continue to be structural changes in how companies need to mirror the needs of the market and changing customer demographics. The key takeaway from this article (and the research featured herein) is that companies need to engage and show empathy, and phone interactions remain the principal means by which they can do this. They need to align their resources to today's reality while building to take on the challenges ahead when it comes to creating meaningful interactions via alternative channels.

We started with a nod to the ongoing debate around what omni-channel means. For the purposes of this discussion, the difference between omni-channel, multi-channel and cross-channel are actually moot when it comes to enabling customer service interactions within the context of the overall CX today.

Most companies are struggling with the very practical and immediate issues of managing inbound customer contacts within and across channels and aligning their processes and platforms to deal with them. And, more often than not, it's their employees who stand to win the day when they engage customers at key service interactions. Their ability to manage those interactions and smooth critical hand-offs between channels can make all the difference.

Here are six steps companies can take across all contact channels to improve their CX now:

Empower reps to resolve issues. Employees who are encouraged to use their unique skills, abilities and creativity to resolve the customers' issues are more satisfied and engaged and provide a better customer experience.

Add personality and personalization. While scripts and templates are great for guiding an appropriate response, leave room for personalization and letting reps make it real and authentic. Creating an emotional connection is especially critical with digital responses but voice tone can also make or break a customer interaction with phone response.

Timeliness counts. Especially with the digital channels, a long delay between posting and response significantly degrades the customer experience. Having chat available or placing your company in the social media arena isn't enough. How quickly you respond and engage is what creates a great customer experience.

Acknowledge and empathize. Automatic acknowledgement of online form/e-mail contacts helps reassure the customer that their request was received and sets expectations for response time. When responding, reps should be trained to always, in all channels, acknowledge and genuinely empathize with the customer's situation. The customer needs to know they were heard before they will be ready to hear any response.

Stay within the channel. Customers who contact via chat, online form/e-mail or social media have selected their contact preference. Focus on addressing their needs within this channel and try to avoid moving to a different channel for final resolution.

Stay focused. Especially with digital channels, customers expect short and succinct responses. Keep it positive. Focus on the customer's situation and what you can do; no excuses or rationale.

Beguiled by technology

It's convenient to be beguiled by technology and view social media as an "easy out" when managing customer interactions. This is especially the case when companies mistakenly view their contact center as a cost center and every contact as a problem to minimize (rather than an opportunity to engage customers and reinforce the brand promise). We see this tension between operational efficiency and customer experience management effectiveness daily.

Sound familiar in your company? If so, the evidence of the damage this could be doing to your customer loyalty is there for all to see! Of course customers will continue to seek out alternative channels to engage your organization. The key is, this must be of "their choosing" and when they do, you'd better be ready to do it well! So, ask yourself: Have you covered all the bases and are your policies, processes and people aligned to manage them effectively and with a relentless focus on the customer? Then put yourself in your customer's shoes and ask yourself again: do you like what you see, hear and feel?

Crystal Collier is CEO and Gavin Winter is vice president strategic solutions at CX Act, an Arlington, Va., customer experience consulting firm. They can be reached at ccollier@cxact.com and gwinter@cxact.com, respectively.

Names of Note

■ *Confluence Marketing*, Red Wing, Minn., has hired **Steve Akerson** as senior vice president.

■ **Emil Martinez** has joined State College, Pa., research firm *VideoMining Corp.*, as chief business development officer.

■ Restaurant chain *Taco John's*, Cheyenne, Wyo., has hired **Billie Jo Waara** as its new chief marketing officer.

■ *WorkPlace Impact* has appointed **Mary Beth Agase** as vice president of sales and **Pete Aranavage** as vice president of operations. Also, **Dan Llewellyn** was promoted to vice president of business development.

■ **Pete Aitkin** has joined *OP4G*, Portsmouth, N.H., as vice president of North American sales.

■ New York researcher *SurveyHealthCare* has hired **John Castellano** as vice president of business development.

■ Fenton, Mo., researcher *Maritz Research* has appointed **Nigel Cover** as vice president for business services.

■ *MediaMath*, a New York Internet firm, has hired **Ross McNab** as managing director and **Jake Engwerda** as vice president, sales.

quirks.com/articles/2014/20141011

■ **Jonathan de Pass**, founder and CEO of *Evaluate Ltd.*, a London marketing information firm, was selected by *PharmaVOICE* magazine as one of the top 100 most inspirational and influential people in the life sciences industry.

■ Auburn Hills, Mich., research firm *Gongos* has appointed **Katherine Ephlin** as COO and **Susan Scarlet** as vice president, strategic branding.

■ North Sydney, Australia researcher *OzTAM* has named **Padraig O'Donovan** as its digital strategy director.

■ *Porsche Cars Canada Limited*, Ontario, Canada, has appointed **Alexander Schildt** as marketing director.

■ *Apple*, San Francisco, has hired **Musa Tariq** to head its social media department.

■ *ComScore*, a Reston, Va., research firm, has hired **Mel Wesley** as CFO.

■ **Harvey Goldhersz** has been named chief data officer and CEO of *GroupM Analytics*, a division of the New York marketing firm GroupM.

■ New York research firm *Ipsos ASI* has hired **Caroline Walker** as managing director and **Paul Edwards** as non-executive director. Also, **Lucy Burnham** has been hired to head up one of ASI's three teams.

■ *Invoke Solutions*, a Boston research firm, has hired **Daniel Krason** as vice president of sales and marketing.

■ **Jesse Epstein** has joined the New York office of London researcher *Incite* as principal, along with **Daniela Cinali** as associate.

■ The New York office of *Tonic*, a London research firm, has hired **David Miller** as executive vice president and promoted **Matt Ayers** to vice president of client services.

■ **Mike Kail** has joined *Yahoo*, San Francisco, as CIO and senior vice president, infrastructure.

■ *The British Heart Foundation*, London, has hired **Carolan Davidge** as its first marketing and engagement director.

■ *Razor Research*, London, has hired **Amy Cosgrave** as an associate director.

■ London researcher *Hall & Partners* has added **Yukiko Obata** to its Tokyo office as an account director within the Japan Health Team.

■ *The Principal Financial Group*, Des Moines, Iowa, has hired **Elizabeth Brady** as senior vice president and chief marketing officer.

■ Montreal research company *Leger* has appointed **Sheri Lambert** as head of its new services market research operations.

■ Concord, Mass., information services firm *Avention* has hired **Steve Pogorzelski** as CEO.

■ **Selena King** has joined London research firm *Firefish* as its new qualitative group head.

■ Paris research company *Ipsos* has appointed **Aldrin Stephen Luiz** as executive director and head of its MediaCT business in India, based in the Mumbai office.

■ *The Newspaper Works*, a New South Wales, Australia, advocacy association, has appointed **Brian Rock** as research and insights manager.

■ Ludinghausen, Germany, research firm *Kleffmann Group* has promoted **Carolina Coelho** to global HR and operations manager.

■ **Roxanne Salen** has joined Cincinnati researcher *Burke, Inc.* as a senior account executive in client services.

■ Indianapolis consulting firm *Walker Information* has named **Sean Clayton** senior vice president and strategic account manager.

■ Philadelphia researcher *MRops* has hired **Jeff Palish** as senior vice president, client services.

■ **Christian Diedrich** has joined Germany-based *GfK* as its chief financial officer.

■ *Thoroughbred Research Group*, Louisville, Ky., has hired **Reagan Barbee** as lead research manager.

■ **Sean Creamer** has been named executive vice president and CFO at the *Madison Square Garden Company* in New York.

■ **Rebecca Coleman** and **Phoebe Checker** have joined *Crowd DNA*, a Maidenhead, U.K., technology firm.

■ London research firm *YouthSight* has appointed **James MacGregor** as director of higher education research.

■ New York software firm *L2* has appointed **Scott Ernst** as CEO.

■ **James Quarles** has joined *Instagram*, San Francisco, in the newly added position of global head of business and brand development.

■ *The Local Search Association*, Troy, Mich., has appointed **Greg Sterling** as its first vice president of strategy and insights.

■ London researcher *YouGov* has promoted **Sundip Chahal** to the newly created role of group chief operating officer.

■ **Arpapat (Nokki) Boonrod** will join Horsham, Pa., research company *TNS* as its new managing director in Thailand.

■ Los Angeles research firm *BB-Media Business Bureau* has hired **John Camarillo** as business development and strategy director.

■ *Directions Research Inc.*, Cincinnati, has appointed **Joseph Hall** as senior vice president, big data custom solutions, **Miguel Martinez-Baco** as vice president, qualitative and Hispanic insights and **Jeff Eha** as account manager. Also, **Jim Lane** was promoted to CMO and **Tim Laake** was promoted to senior vice president, key accounts and business development.

■ *Added Value* South Africa, a Johannesburg, South Africa, research company, has appointed **Nicole Shapiro** as associate director.

■ *The Futures Company*, a London management consulting firm, has appointed **Valeria Piaggio** as vice president of multicultural insights for its U.S. Yankelovich Monitor division. She will be based in Chicago.

■ New York data management and analytics company *Mediamorph* has appointed **Rob Gardos** as its new CEO. **Mike Sid**, cofounder, will become chief strategy officer.

■ **Tom Markert** has joined *Research Now*, Plano, Texas, as executive vice president of sales and business development.

■ New York researcher *Nielsen* has promoted **John Lewis** to global president. **Karen Fichuk** will replace him as president, North America.

■ **Satya Yenigalla** has joined *FacialNetwork*, a Henderson, Nev., cloud-based facial recognition firm, as its COO.

■ *Quantcast*, a San Francisco Internet company, has promoted **Matt White** to the role of U.K. managing director, replacing **Phil Macauley**, who had been named EMEA managing director earlier this year.

■ Halifax, U.K., research firm *Teamsearch Fieldwork* has hired **Mark Briggs** and **Sajjad Naseer** to its project management team.

■ New York researcher *Nielsen* has promoted **Steve Hasker** to global president across the media sector.

■ **Erica Winters** has joined *Research & Marketing Strategies Inc.*, Baldwinsville, N.Y., as a market research analyst.

■ *Geometry Global*, a division of WPP, has hired **Mary Jane Butler** for its new role of client service director in Singapore.

■ London research firm *Tonic Insight* has promoted **Anna Wills** to the role of U.K. managing director and appointed **Lucie Holliday** group director, research and innovation.

■ *BBC Worldwide Australia and New Zealand*, Sydney, has appointed **Joe Lynch** as head of research and consumer insights.

■ Chicago research firm *Information Resources Inc.* has appointed **José Carlos González-Hurtado** as president of international.

■ **Jacques Nantel** has joined Montreal, Canada, research company *Leger* as executive vice president, consumer insights.

■ *RTi Research*, Stamford, Conn., has hired **Connor Thorpe** as project director.

■ **Dick Cahill** has joined Oxfordshire, U.K., Internet firm *EngageSciences* as its COO.

■ London research firm *Trinity McQueen* (formerly Brass Insights) has hired **Mike Roderick** as research director.

■ **Stephen Elliot** has joined Framingham, Mass., research company *International Data Corporation* as vice president of the IT infrastructure and cloud practice.

■ **V. "Seenu" Srinivasan**, chief research advisor for Newtown, Penn., research company *Optimal Strategix Group*, received the 2014 Buck Weaver Award for advancement of theory and practice of marketing. This award was established in 2003 at MIT's Sloan School of Management and is sponsored by General Motors Corp. to honor individuals who have made important contributions to the advancement of theory and practice in marketing science.

■ Encino, Calif., research firm *Innovate* has hired **Lisa Wilding-Brown** as executive vice president of global operations and **Amanda Keller** as senior director of global project management.

■ Dallas marketing agency *Moroch* has appointed **Sam Chadha** as the agency's first chief integration officer and has added **Glenn Geller** and **Dina Light-McNeely** to its senior leadership team.

■ *Kenshoo*, a Tel Aviv, Israel, software company, has hired **Doug Chavez** as global head of marketing research and content.

■ Dublin marketing firm *Brandtone* has appointed **Peter Bamford** as chairman.

Research Industry News

News notes

■ London management firm **KPMG** and **Imperial College Business School**, London, have partnered to create the KPMG Centre for Advanced Business Analytics, which will involve a joint team working on 15 to 20 annual projects over an eight-year span. The goal is to help retailers better understand and predict consumer behavior by developing new approaches, analytical methods and tools to analyze big data.

■ Germany-based **GfK Group** has announced its fourth annual Next Generation Competition, encouraging undergraduate students to explore what constitutes brand success in the modern world of digital and targeted marketing. For the first time, entrants will be able to use the GfK MRI's University Reporter database. Contestants must submit a proposal for their research project by October 24; the winning team receives a trip to GfK North American headquarters and a $1,000 prize.

■ **Facebook** launched its Internet.org initiative in Zambia with an Android and Web app designed to provide free data access to Facebook, Messenger, Wikipedia and Google Search for the developing-world populations. Local carrier Airtel is partnering to provide free Web access. The app will be available in a stand-alone version, in the Facebook for Android app or as a mobile Web site which can be accessed by feature phones popular in Zambia. The Internet.org initiative also aims to increase awareness among Zambians of why the Internet is useful and might be worth paying for.

quirks.com/articles/2014/20141012

■ Cincinnati-based **Procter & Gamble** will sell, discontinue or otherwise eliminate as many as 100 brands in the next two years. The move is aimed at cutting costs and allowing the firm to focus on its most important product lines, approximately 70 to 80 brands, in four main sectors: household products, paper goods, beauty and grooming. The company agreed to sell most of its pet food operations earlier this year.

■ **NetScout Systems**, a Westford, Mass., technology firm, has filed a lawsuit against New York technology company **Gartner**, alleging that that Gartner gave companies which purchased its services more favorable rankings in the Gartner Magic Quadrant research reports. NetScout claimed that Gartner's reports have damaged its reputation and caused it to lose business. Gartner officials said the complaint was without merit.

■ **Google** announced that, starting in late September, it would automatically include all close variants to keywords selected by advertisers in Google AdWords. This means Google will include keywords and phrases similar to the original keyword, including plural or misspelled variations. Formerly, advertisers had the option of specifying that queries had to match the keyword exactly.

Acquisitions/transactions

■ Hackensack, N.J., technology firm **Innodata** has acquired **MediaMiser,** an Ottawa, Ontario, software company.

■ **IHS**, an Englewood, Colo., researcher, has acquired **Global Trade Information Services**, Columbia, S.C.

■ Reston, Va., research company **comScore** has acquired **MdotLabs**, a Madison, Wis., Internet company. ComScore will integrate the MdotLab technology with the current comScore non-human traffic detection methods in Media Metrix and validated campaign essentials products.

■ **Palantir Technologies**, a San Francisco software firm, has acquired New York Internet company **Poptip**.

■ Chicago-based investors **Lake Capital** acquired London marketing firm **Engine** in a deal totaling about £100 million. Engine will partner with New York researcher **ORC International** and later with Hollywood, Calif., marketing firm **Trailer Park**, another Lake Capital company. Terry Graunke will join Engine's board as executive chairman and Engine cofounder Peter Scott will become vice chairman and head of global strategy.

■ **SurveyMonkey**, Palo Alto, Calif., has acquired **Fluidware**, an Ottawa, Canada, software company. Financial terms of the transaction were not disclosed.

■ Technology company **FoneWorx** has bought a 35 percent share in **BMi Research**. Both are Johannesburg, South Africa, firms.

■ Memphis, Tenn., Internet firm **Rocket Fuel Inc.** has reached an agreement to acquire **[x+1]**, a New York marketing firm, in a deal of cash and stock valued at about $230 million. Rocket Fuel also reported second quarter revenue of $92.6 million.

■ **Empirix**, a Bedford, Mass., researcher, has acquired Dublin, Ireland-based **Verios Software & Systems**.

■ **Mystery Researchers**, Atlanta, has acquired **Insula Research** of Columbus, Ohio.

■ **Sizmek** has acquired fellow New

York marketing firm **Aerify Media** in a cash deal of $6.25 million.

■ Haarlem, the Netherlands, research firm **iQU** has agreed to purchase **HoneyTracks**, a Munich, Germany, software company for an undisclosed sum.

■ **IgnitionOne** has acquired fellow New York marketing company **Human Demand**.

■ London research company **dunnhumby** has acquired a 50 percent stake in **Sandtable**, a London technology firm. The two companies will develop a joint venture in consumer behavior prediction.

Alliances/strategic partnerships

■ **Tumblr**, New York, has partnered with **Ditto Labs**, a Cambridge, Mass., software firm, providing Ditto Labs with full access to the public feed of Tumblr photos, estimated at 130 million per day. The Ditto Labs software is designed to scan the photos to harvest information on how consumers use and perceive products by identifying logos and items in Tumblr pictures.

■ London marketing firm **Mindshare** is partnering with **Crayon Data**, a Singapore software company, to use its software systems in adaptive marketing, consumer profiling, segmentation, targeting and tracking across a range of media.

■ **Wyndham Rewards**, the Wyndham hotel loyalty program, has partnered with the e-Rewards Opinion Panel of **Research Now,** Plano, Texas, enabling its members to earn reward points by completing online surveys. Separately, Research Now has signed an agreement to partner with the **Greyhound** bus company to allow Greyhound customers to join the e-Rewards Opinion Panel.

■ Toronto research company **Ipsos Reid** has partnered with the **Canadian Sporting Goods Association** to track trends in the industry, using proprietary consumer surveys. Ipsos Reid will also produce in-depth, specialized reports for members.

■ Rotterdam, the Netherlands, research agency **Skim** is partnering with the non-profit **European Pricing Platform** (EPP), West-Flanders, Belgium, to provide strategic pricing research and guidance to EPP members.

■ Montreal marketing firm **Aimia** and **Fractal Analytics**, a San Mateo, Calif., analytics company, have formed a long-term partnership. Aimia will incorporate Fractal's predictive analytic software into its loyalty programs and will extend its expertise in loyalty management to Fractal clients. Aimia also made a minority equity investment in Fractal.

■ London researcher **TNS** has partnered with Palo Alto, Calif., software firm **Medallia** and will join its customer experience flagship product TRI*M with Medallia's real-time customer feedback platform.

■ Cincinnati-based **Nielsen Catalina Solutions** (NCS), which links advertising with Nielsen TV data, is partnering with **FourthWall Media**. The partnership is designed to provide NCS with access to FourthWall's new cable households and allow NCS to expand its single-source panel for CPG marketers.

Awards/rankings

■ Customers of 116 market researchers responding to an annual survey ranked **Research Now**, Plano, Texas, first in five dimensions among 13 online sample providers. This is the first time one company ranked first in all five areas.

New accounts/projects

■ Portland, Ore., research company **Rentrak**, has signed a deal to provide local market television ratings to **Cooper-Smith Advertising**, Toledo, Ohio. Separately, Rentrak has signed a multi-year agreement with **KNBC**, Los Angeles, **KXAS**, Dallas-Fort Worth, and **WTVJ**, Miami-Fort Lauderdale. All are NBC-owned television stations. Also, Palo Alto, Calif., broadcaster **Willow TV** has contracted with Rentrak to measure the television and video audiences of Willow's live cricket matches.

New companies/new divisions/relocations/expansions

■ Tim Glowa and Garry Spinks have launched **Bug Insights**, a marketing analytics firm, in Houston and Atlanta.

■ In Cold Spring, Ky., Sarah Faulkner has launched research firm **Faulkner Strategic Consulting**.

■ London management firm the **Futures Company** has opened an office in Shanghai which will be led by Kunal Sinha.

■ **Cint**, a Stockholm software firm,

has relocated its Japanese office to a larger facility in Nishi-Shinjuku and hired Arianne Dumayas as project and customer support manager.

■ Researcher **Mizzouri** has opened its new headquarters in Franklin, Tenn.

■ Trevor Testwuide and Alison Lohse have launched **Conversion Logic**, a Santa Monica, Calif., company specializing in cross-platform video measurement.

■ Steve Murphy and Yazid Jamian have launched a new agency, **Green Zebras**, in Kuala Lumpur, Malaysia.

Research company earnings/ financial news

■ **Simon-Kucher and Partners**, Bonn, Germany, reported first-half revenue growth of 14 percent to EUR 82.5 million. 2013 revenue was £125 million.

■ **Forrester Research**, Cambridge, Mass., has reported second-quarter revenue of $82.9 million, up 5 percent from $79.0 million in the previous 12-month period.

■ **Join the Dots**, a Wexford, Ireland, online marketing firm, reported revenue growth of 16 percent in the first half of the year, compared to the same period in 2013.

■ New York technology company **Gartner** has reported second-quarter revenue of $519.8 million, up 17 percent, with second-quarter revenue in the research division up 15 percent to $358.5 million.

■ London consulting firm **Nunwood** reported first-half 2014 sales of £5.3 million, up 23 percent from the same period in 2013.

■ Lincoln, Neb.-based **National Research Corporation** reported income for the second quarter of 2014, with revenue up 7 percent to $24.0 million and net income up 18 percent to $4.1 million.

■ Portland, Ore., research company **Rentrak** announced financial results for the 2014 second quarter, with total revenue increasing 34 percent to $22.3 million. The firm's TV Everywhere division had an increase of 84 percent in income to $10.5 million.

■ **Study Hall Research**, Tampa, Fla., reported second-quarter 2014 revenues had increased 10.7 percent compared to the same period in 2013.

■ Germany-based **GfK** reported a sales decrease of 1.6 percent, which currency effects increased to 4.2 percent, for the first half of 2014 compared to the same period in 2013.

■ Palo Alto, Calif., software company **Infer** announced a 150 percent increase in its customer base over the past quarter.

■ **YuMe**, a Redwood City, Calif., marketing firm, announced revenue of $40.4 million for the second quarter of 2014, an increase of 18 percent over the same period in 2013.

CALENDAR OF EVENTS

••• can't-miss activities

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.

featured

Quirk's will sponsor a networking event, themed "Cocktails with Quirk's" on October 20 from 7:30-10:30 p.m. at the Biergarten in Boca Raton, Fla.

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#.

The 2014 European Pharma market Research Conference will be held on **October 21-22** at the Hyatt Regency Mainz Hotel, **Mainz, Germany.** Visit http://pharmamarketresearchconference.com/.

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.

Global Executive Events will hold a conference, themed "Unleashing Data Summit: Innovations in Market Research and Customer Insights," on October 29-30 in New York. Visit www.globalexecutiveevents.com.

The 13th Annual Text Analytics Summit West conference will be held on November 4-5 at the Hotel Kabuki in San Francisco. Visit http://textanalyticsnews.com/west/

IIR will hold its annual conference focused on future trends on November 11-12 at the SLS Hotel in Beverly Hills, Calif. Visit http://www.iirusa.com/futuretrends/home.xml. .

Worldwide Business Research will hold a conference, themed "ProcureCon for Digital and Marketing Services," on November 15-17 in Dallas. Visit www.procurecondm.com.

ESOMAR will hold its Qualitative Research Conference on November 16-18 in Venice, Italy. Visit http://www.esomar.org.

Predictive Analytics & Business Insights 2014 will be held on November 19-20 in San Francisco, Calif. Visit http://www.predictiveanalytics2014.com.

Unicom will host a conference, themed "Real-Time Analytics & Operational BI" on November 27 in London. Visit http://conferences.unicom.co.uk/real-time-analytics/index.php.

The Neuromarketing Theory and Practice Conference will hold its Market Research Exchange conference on December 2-3 in London. Visit http://www.neuromarketingtheorypractice.com/events.

The International Quality and Productivity Center (IQPC) will hold its Market Research Exchange conference on December 3-5 at the Ritz Carlton, Amelia Island, Fla. Visit www.marketresearch-exchange.com.

The International Quality and Productivity Center will hold its annual customer experience summit on December 8-10 in New Orleans. Visit http://bit.ly/1qMguqT.

The Strategy Institute will hold its Digital Marketing for Financial Services Summit on December 9-10 in New York. Visit www.financialdigitalmarketingus.com.

Corp Events will host its annual conference, themed "Data Marketing 2014: Unlocking the Power of Your Customer Information," on December 10-11 at the Eaton Chelsea Hotel in Toronto. Visit www.datamarketing.ca.

Toluna will host a Webinar, titled "Coupling a branded community approach with social media data to deepen insight – a case study with Discovery Channel," on December 11 at 1 p.m. EDT. Visit http://bit.ly/1pMorPI.

The Neuromarketing Science and Business Administration (NMSBA) will hold a conference titled, "Neuromarketing Theory and Practice" on January 26-27 in San Francisco.

IIR will hold the Media Insights and Engagement Conference on February 3-5 at the Westin San Diego, San Diego, Calif. Visit http://www.iirusa.com/mediainsights/home.xml.

The 2015 Pharma Market Research Conference (U.S.) will be held on February 4-5 at the Hilton Parsippany Hotel, Parsippany, New Jersey. Visit http://pharmamarketresearchconference.com.

The Quirk's Event 2015 will be held on February 23-24 at the New York Marirott at the Brooklyn Bridge in Brooklyn. Visit quirks.com/theevent.

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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U.S. Postal Service Required by 39 U.S.C 3685 Statement of Ownership, Management and Circulation 1. Title of Publication: Quirk's Marketing Research Review. 2. Publication No.: 0893-7451. 3. Date of Filing: Sept. 23, 2014. 4. Frequency of Issue: Jan., Feb., Mar., Apr., May, June, July, Aug., Sept., Oct., Nov., Dec. 5. No. of Issues Published Annually: 12. 6. Annual Subscription Price: None and $70.00. 7. Complete Mailing Address of Known Office of Publication: 4662 Slater Road, Eagan, MN 55122-2362. Contact: Steve Quirk. Telephone: 651-379-6200. 8. Complete Mailing Address of the Headquarters of General Business Offices of the Publisher: 4662 Slater Road, Eagan, MN 55122-2362. 9. Full Names and Complete Mailing Address of Publisher, Editor, and Managing Editor. Publisher: Steve Quirk, 4662 Slater Road, Eagan, MN 55122-2362; Editor: Joseph Rydholm, 4662 Slater Road, Eagan, MN 55122-2362. Managing Editor: Not Applicable; 10. Owner: Quirk Enterprises, Inc., 4662 Slater Road, Eagan, MN 55122-2362; Stockholders: John P. Quirk, 6798 Redwood Ave. NW, South Haven, MN 55328, James T. Quirk, 4662 Slater Road, Eagan, MN 55122-2362, Daniel M. Quirk, 4662 Slater Rd., Eagan, MN 55122-2362, Stephen R. Quirk, 4662 Slater Rd., Eagan, MN 55122-2362, Ann M. Quirk, 4662 Slater Road, Eagan, MN 55122-2362. Teresa K. Tweed, 16932 Hubbard Trail, Lakeville, MN 55044 11. Known Bondholders, Mortgagees, and Other Security Holders Owning 1 Percent or More of Total Amount of Bonds, Mortgages or Other Securities: None. 12. For Completion by Nonprofit Organizations Authorized to Mail at Special Rates: Not Applicable. 13. Publication Name: Quirk's Marketing Research Review 14. Issue Date for Circulation Data Below: September 2014. 15. Extent and Nature of Circulation: Average No. Copies Each Issue During Preceding 12 Months: A. Total No. Copies (Net Press Run): 17,673. B1. Paid/ Requested Mail Subscriptions Stated on Form 3541.: 11,298. B2. Copies Requested by Employers for Distribution to Employees by Name or Position Stated on PS Form 3541: None. B3. Sales Through Dealers and Carriers, Street Vendors, Counter Sales, and Other Paid or Requested Distribution Outside the USPS: None. B4. Requested Copies Distributed by Other Mail Classes Through the USPS: None. C. Total Paid and/or Requested Circulation: 11,298. D. Nonrequested Distribution (By Mail and Outside the Mail). D1. Nonrequested Copies Stated on Form 3541: 5,703. D2. Nonrequested Copies Distributed Through the USPS by Other Classes of Mail: None. D3. Nonrequested Copies Distributed Outside the Mail: None. D3. Nonrequested Copies Distributed Outside the Mail: None E. Total Nonrequested Distribution: 5,703. F. Total Distribution: 17,001. G. Total Copies Not Distributed: 672. H. Total: 17,673. I. Percent Paid and/or Requested Circulation: 66.5% Actual No. Copies of Single Issue Published Nearest to Filing Date. A. 17,400; B1. 11,276; B2. None; B3. None; B4. None; C. 11,276; D1. 5,699; D2. None; D3. None; D4. None; E. 5,699; F. 16,975; G. 425; H. 17,400; I. Percent Paid and/or Requested Circulation: 66.4%. I certify that the statements made by me above are correct and complete: Steve Quirk, Publisher.

BEFORE YOU GO ••• issue highlights and parting words

••• cover-to-cover

Facts, figures and insights from this month's issue

page 26

Try putting yourself in the respondents' shoes. How interesting would it be to answer a series of closed-ended questions for an hour?

page 41

As market researchers, we presume that a patient's ability to recall events and information improves over time. This is not only incorrect – it seems to be the complete opposite.

page 55

Consumer distrust of large institutions can vary by gender and type of institution.

Enjoy Cocktails with Quirk's at TMRE in Florida!

Attending TMRE? Join Quirk's on October 20 for craft beer, wine and a casual networking event! Mingle and network with other Quirk's subscribers and supporters at the Biergarten in Boca Raton, Fla. Free drinks and appetizers will be provided. What better way to celebrate Oktoberfest than with a cold bier in Boca!

Space is limited, so please register in advance at http://linktrack.info/boca_raton.

Become a speaker at the Quirk's Event!

The Quirk's Event is more than just a marketing research conference – it's an insights experience for all! In order to incorporate an interactive exhibit hall with thought-leader technique and case study sessions along with product demos, we are inviting thoughtful practitioners to submit presentation ideas for the speaker slots that will be available over the two-day event.

This is your opportunity to showcase your firm's latest work and expertise to our expected audience of more than 750 insights and marketing research professionals. If you'd like an opportunity to speak, contact us today at events@quirks.com or submit your proposal at www.quirks.com/speak.aspx.

Quirk's Marketing Research Review, (ISSN 08937451) is issued monthly by Quirk Enterprises Inc., 4662 Slater Road, Eagan, MN 55122. Mailing address: P.O. Box 22268, St. Paul, MN 55122. Tel.: 651-379-6200; Fax: 651-379-6205; E-mail: info@quirks.com; Web address: www.quirks.com. Periodicals postage paid at St. Paul, MN and additional mailing offices.

Subscription Information: U.S. annual rate (12 issues) $70; Canada and Mexico rate $120 (U.S. funds); international rate $120 (U.S. funds). U.S. single-copy price $10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change.

POSTMASTER: Please send change of address to QMRR, P.O. Box 22268, St. Paul, MN 55122.