Goodbye 2014, hello 2015

Why qual, neuro MR can be BFFs

What's next for non-conscious?

QUIRK'S
Marketing Research Review

Game on

How game-enhanced survey designs improve respondent satisfaction, data quality

January 2015
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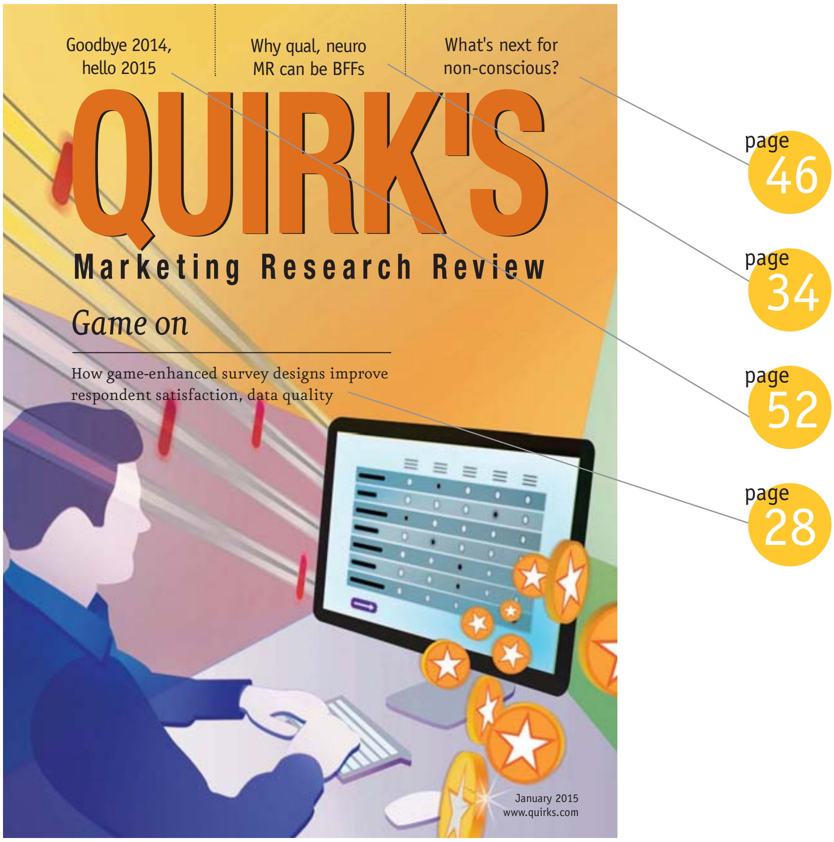

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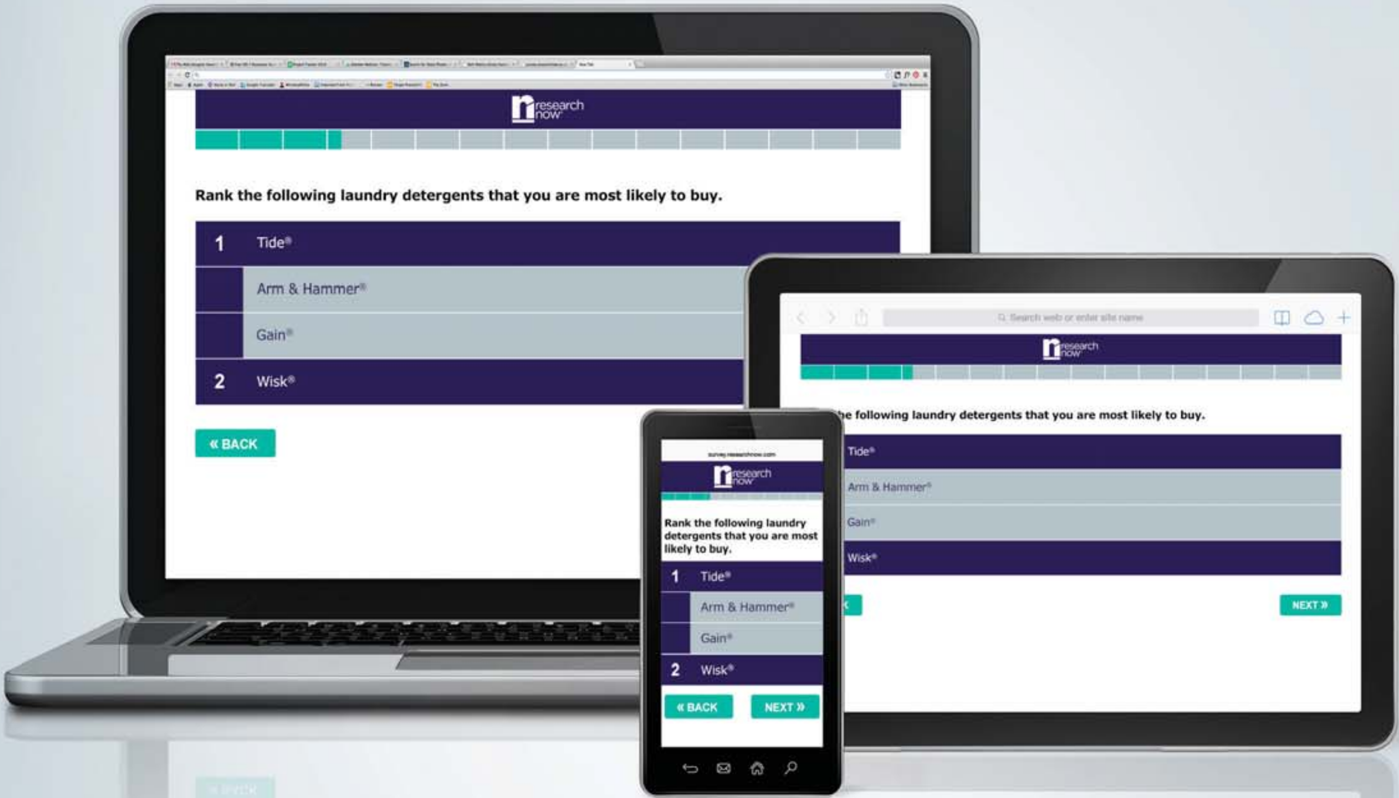

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••• millennials research

Millennials will drive home-buying surge

Home-sales information site Zillow predicts a big year for home buyers in 2015, with more Millennials entering the market amid rising rents. Among Zillow's predictions for 2015: U.S. rents will outpace home values by the end of the year; builders will begin constructing more lower-priced homes; Millennials will overtake Generation X as the largest group of home buyers; and home buyers will have more negotiating power in 2015.

First-time home buyers will be a critical part of the housing market this year and certain markets will have more favorable conditions than others for buyers looking for that perfect entry-level home. Markets most favorable to first-time buyers are those with strong income growth among 23-34-year-olds; significant growth in the number of entry-level homes on the market; and home prices that won't take a big chunk out of buyers' paychecks. Zillow predicts the best markets for first-time buyers in 2015 will be: Pittsburgh, Hartford, Conn.; Chicago, Las Vegas and Atlanta.

"Roughly 42 percent of Millennials say they want to buy a home in the next one to five years, compared to just 31 percent of Generation X, and by the end of 2015 Millennials will become the largest home-buying age group," says Stan Humphries, Zillow's chief economist. "The lack of home-buying activity from Millennials thus far is decidedly not because this generation isn't interested in homeownership but instead because younger Americans have been delaying getting married and having children, two key drivers in the decision to buy that first home. As this generation matures, they will become a home-buying force to be reckoned with."

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••• employment research

Job seekers will be in control in 2015

Hiring managers anticipate adding more professionals at a record level in the first half of 2015, according to the semi-annual national survey from Dice Holdings Inc., a provider of specialized Web sites for professional communities. Sixty-percent of hiring managers expect an uptick in hiring in the year ahead, which is four points higher than the mid-year survey and five more than November 2013.

While hiring is expected to be on the upswing in the six months ahead, filling roles is a challenge for companies. Four in 10 (42 percent) hiring managers note the time to fill open positions has lengthened compared to last year, citing the inability to find qualified professionals as the main culprit. That compares to 39 percent who said this in June 2014.

Once companies find the desired candidate, it's not always a mutual attraction, further proof that today is a candidate's market. More candidates than ever before are rejecting offers, with 29 percent of hiring managers seeing rebuffs, compared to 26 percent in June 2014 and November 2013.

On average, candidates are asking for more money as compared to six months ago, according to 52 percent of hiring managers. Roughly half (49 percent) of recruiters anticipate higher salaries for new hires compared to last year.

By Joseph Rydholm, Quirk's Editor

Holding up a mirror


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Joe Rydholm can be reached at joe@quirks.com

As an editor, I've always viewed my role here as holding up a mirror rather than a cattle prod. I don't have an agenda or strong feelings that the research and insights industry must do Crucial Thing A or Crucial Thing B in order to survive. Sure, I have some thoughts on which courses of action seem to hold the most promise. But I've never been a marketing researcher, so I don't know what it's like to walk a mile in your shoes. Thus I've never felt comfortable, as I've noted in this space many times, making grand pronouncements about the Future of Marketing Research.

But what I *do* feel comfortable doing is talking to people, reading the comments they make to us and to their peers across the various online outlets and trying to assemble content that reflects and hopefully adds to the intelligent discussion of the myriad issues they're grappling with.

When I seek out content related to my own profession – editing – the stuff that I find most useful, whether it's an article, a blog post or a Webinar, tends to be generated by other editors, people who have looked at the same problems or dealt with the same situations I'm dealing with and have some welcome advice (and empathy!) to pass along.

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I think it's valuable to let readers see themselves in our pages, see the topics and problems they are thinking about or working on and give voice to their doubts or fears or ways of getting through their daily challenges.

Along those lines, elsewhere in this issue you'll find a recap of our Q&A piece in which we asked researchers to address a handful of questions about 2014 and their views of what's ahead for 2015.

One question asked them which topics the industry is talking too much about and which the industry isn't talking enough about. Space didn't permit us to run the answers to that question in this issue (we'll do that in a January edition of our e-newsletter) but here's a sampling of what researchers told us is being talked about too much or not enough:

"A lot of column space has been spent on the potential of 'new MR' stuff, from big data to mobile to neuro, but we are not talking about how to implement and integrate input from those methods, we're not really focusing on 'How are we going to make this work?'" – David McCallum, managing partner, Gordon & McCallum

"There will always be a new methodology that seems to be the new big thing. I guess text analytics could be grouped with big data. Yes, it's nice to have a new technology that you can use, or more data to analyze, but let's get back to the basics: What is the question we need to answer and how do we answer the question in the best way?" – Andris Versteeg, senior data analyst, SA Health

"As for what's being talked about too much, in many cases we are giving those consumers active in the online social space too large of a megaphone. While the spontaneous conversations that occur about brands online are useful, we need to remember that those who choose to talk about a brand or service experience online are not necessarily representative of the overall customer base – the 'silent majority' who drive the bulk of sales and consumption for most brands." – Jeri Smith, president and CEO, Communicus Inc.

"What isn't being talked about is the impact that DIY technology will have long-term on corporate researchers. We hear plenty about how technology has enabled corporate researchers in the short-term. The reality is that for years the research community has been perceived as tactical and not strategic. The concern long-term is how corporate will avoid falling into the same trap. If corporate isn't perceived as strategic, then where does that leave the industry?" – Scott Layne, president, the Marketing Workshop

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••• mothers research

BabyCenter reveals top baby names of 2014

Little Francis sure likes to scheme

Jackson held tight as the top boys' name for the second year and Sophia led the girls for the fifth year in a row, according to results from San Francisco-based BabyCenter's annual Baby Names Survey and the Top 100 Baby Names of 2014. Three new names popped into the top 10 lists, including Caden and Logan for boys and Madelyn for girls.

"[The 2014] list shows Jackson has staying power and is not a one-hit wonder, and Sophia is arguably the Jennifer of its generation, with five consecutive No. 1 spots. It's clearly entered the baby name hall of fame," says Linda Murray, BabyCenter global editor in chief.

As for what inspires parents to pick a baby name, TV has become a dominating factor. Nearly 20 percent of moms surveyed found inspiration from TV-show characters and 16 percent looked to actors and actresses for great baby name ideas. "[2014 was] the year of the binge-watching baby name," says Murray. "When you spend 16 hours in one weekend binge-watching your favorite series, you can't help but fall in love with the characters' names. The correlation between trending baby names and trending binge-watch shows is undeniable."

Additionally, the survey provided insights on baby names and social sharing. Ninety-four percent of those surveyed used social media/technology to announce their baby's name. Facebook is the preferred media for sharing names (58 percent), ahead of offline methods such as in person conversations (50 percent) and phone calls (45 percent). Forty-four percent shared their baby's name through social media immediately after the baby's birth or after deciding to announce it.

Based on the names of more than 406,000 babies born in 2014 to moms registered on the BabyCenter site, BabyCenter's Top 100 Baby Names list combines names that sound the same but have different spellings, making it a true measure of baby name popularity. The site also conducts its Baby Names Survey each year, talking directly to new and expecting parents about their baby name decisions and diving deep into the psychology and trends surrounding baby-naming.

Top 10 Baby Names of 2014

Girls	Boys
Sophia	Jackson
Emma	Aiden
Olivia	Liam
Ava	Lucas
Isabella	Noah
Mia	Mason
Zoe	Ethan
Lily	Caden
Emily	Jacob
Madelyn	Logan

Several *House of Cards* character names showed an increase since 2013, including Garrett (up 16 percent), Claire (up 14 percent), Zoe (up 13 percent) and Remy (up 11 percent). Both Frank (up 19 percent) and Francis (up 5 percent) jumped in popularity. Interestingly, in

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addition to Robin Wright's character's name (Claire) jumping in the ranks, both Robin (up 12 percent) and Wright (up 65 percent) saw significant gains.

Not to be outdone, *Orange Is the New Black* character names skyrocketed in popularity, including Galina (up 67 percent), Nicky (up 35 percent), Piper (up 28 percent), Larry (up 28 percent) and Dayanara (up 19 percent).

The names of both Netflix co-founders also increased, with Marc (Randolph) rising 15 percent and Reed (Hastings) jumping 11 percent.

Many of the names from ABC's popular show *Nashville* are skyrocketing in popularity. Luke saw the greatest gain, jumping 44 percent, followed by Avery (up 25 percent), Deacon (up 22 percent), Daphne (up 15 percent), Gunnar (up 14 percent), and Scarlett (up 13 percent).

And, while her character's name (Juliette) is on the decline, moms still love Hayden Panettiere. The name Hayden rose 23 percent.

Additionally, Southern-style names are increasing in popularity, including Tennessee (up 61 percent for boys and 8 percent for girls), Macon (up 29 percent), Virginia (up 21 percent), Charlotte (up 19 percent), Raleigh (up 11 percent) and Austin (up 11 percent). Even Nash increased by nearly 10 percent!

Shonda Rhimes isn't only the creative force behind many of moms' favorite TV dramas – she's also influencing baby names. Across the board, names from *Grey's Anatomy*, *Scandal* and *How to Get Away With Murder* increased in popularity. *Grey's Anatomy* names include Arizona (up 35 percent), Callie (up 30 percent), Miranda (up 15 percent), and Owen (up 14 percent). And of course, Jackson is this year's No. 1 boys' name.

Scandal names include Fitzgerald (up 56 percent), Huck (up 44 percent), and Cyrus (up 13 percent). Not to mention, Olivia is the third-most-popular girls' name. Additionally, the names of the actors are on the rise, including Bellamy (up 28 percent), Jeff (up 25 percent), Scott (up 25 percent), Darby (up 18 percent) and Guillermo (up 18 percent).

It turns out *Frozen* isn't just for kids – the creative, strong character names are giving moms some fresh, new baby-name options. The biggest influences are Elsa (up 29 percent), Duke (up 29 percent) and Hans (up 19 percent). Anna, already a popular name, is holding steady. Although there were no baby girls named Idina in BabyCenter's 2013 database, this year, there's one little Idina.

Are moms hoping for a future hall of famer? Baseball's Derek Jeter's goodbye tour clearly had an effect on moms' naming choices this year: Jeter increased 82 percent while Derek jumped 10 spots (up 4 percent).

Parents flocked to destination names last year. Names traveling up include Everest (up 70 percent for boys and 21 percent for girls), Verona (up 58 percent), Bronx (up 34 percent), Aspen (up 33 percent), Cairo (up 41 percent), Persia (up 16 percent), Kenya (up 16 percent), Egypt (up 15 percent), Israel (up 14 percent), and Boston (up 10 percent). In fact, one in four of those undecided on a name said they might choose the name of a place they associate with special memories.

www.babycenter.com/top-baby-names

••• transportation research

Canadian commuters keep calm

Vancouver has the lock on gridlock

As reported by The Canadian Press, Canadians actually enjoy their commute and find it relaxing, according a study released by Toronto ad agency Bensimon Byrne – a finding that runs contrary to the popular vision of commuters as harried and fed up, if not enraged. Even more surprisingly, three-quarters of commuters report being in a better mood after their commute, according to the survey.

"The results are an eye-opener and contradict the prevailing narrative of commuting – which is often conveyed as long and negatively affecting our work-life balance," says Max Valiquette, managing director of strategy, Bensimon Byrne. "In fact, our findings show that having some time to relax and rest, or a few quiet moments to reflect is what makes commuting so important and desirable."

The online survey, conducted for Bensimon Byrne by the Gandalf Group, questioned 1,500 people in various regions of the country, with an oversampling of commuters in the greater Toronto area as well as samplings in Quebec proportional to the number of the province's French and English speakers.

The Gandalf survey found that three-quarters of respondents would prefer to be alone during their commute. As a result, drivers in the survey were slightly more likely to strongly agree (56 percent) that their commute is an opportunity to have some quiet time by themselves, compared with 49 percent of public transit users.

Transit users tend to face a more difficult commute but use their commuting time to rest and relax, the survey said.

The oversampling of greater Toronto area (GTA) respondents supported, for the most part, trends found elsewhere. However, GTA commutes tend to be longer and commuters there were less likely to be in a better mood after their commute (72 percent) relative to the national average of 77 percent, the survey found. And slightly more respondents in the GTA (16 percent) dreaded their commute versus the national average of 11 percent.

Interestingly, outer GTA commuters were almost twice as likely to dread their commutes as city of Toronto residents, in spite of the fact that they are twice as likely to drive, tend to have shorter commutes and are more likely to live in and commute to suburban rather than urban communities, the survey found.

Nationally, two-thirds of respondents reported having a commute of 30 minutes or less, half said they drive, 25 percent use public transit, 14 percent were automobile passengers, 6 percent walk and two percent used a bicycle.

Some 15.4 million Canadians endure a daily commute to and from work, based on Statistics Canada's 2011 National Household Survey. It also found that four out of five commuters reported taking a private vehicle, most of them driving themselves, the survey found.

Vancouver ranked the worst city in the country for gridlock, according to a 2014 study. The study found the average commuter in Vancouver experienced 87 hours of delay time per year, based on a 30-minute daily commute.

After Vancouver, the most congested cities in Canada were Toronto, Ottawa, Montreal, Calgary, Quebec City and Edmonton, according to the index.

••• online research

Keep the Web affordable, please

Low-cost access a 'basic human right'

A survey of Internet users in 24 countries has found that 83 percent of them believe that affordable access to the Internet should be a basic human right. The study also found that two-thirds (64 percent) of users are more concerned today about online privacy than they were compared to one year ago.

The CIGI-Ipsos Global Survey on Internet Security and Trust, undertaken by the Centre for International Governance Innovation (CIGI) and conducted by research company Ipsos, also found that when given a choice of various governance sources to effectively run the worldwide Internet, a majority (57 percent) chose the multistakeholder option – a "combined body of technology companies, engineers, non-governmental organizations and institutions that represent the interests and will of ordinary citizens, and governments."

The survey of 23,376 Internet users was carried out between October 7, 2014, and November 12, 2014, in Australia, Brazil, Canada, China, Egypt, France, Germany, Great Britain, Hong Kong, India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Pakistan, Poland, South Africa, South Korea, Sweden, Tunisia, Turkey and the United States.

In terms of top overall levels of concern, it's criminals hacking into personal bank accounts (78 percent) that heads the list, followed by concern about someone hacking into users' online accounts and stealing their personal information like photos and private messages (77 percent) and a private company monitoring their online activities (such as their Internet surfing habits) and then selling that information for commercial purposes without their explicit consent (74 percent).

Following on concerns about invasive criminal or marketing incursions that might affect them personally come broader concerns related to governments and institutions: A full majority (72 percent) are concerned about important institutions in their country being cyber-attacked by a foreign government or terrorist organization followed by two-thirds (64 percent) who are concerned about governments censoring the Internet, almost equally (62 percent) concerned about government agencies from other country secretly monitoring their online activities and six in 10 (61 percent) concerned about the police or other government agencies from their own country secretly monitoring their online activities.

Even if coincidentally, a majority (60 percent) have heard something about Edward Snowden, the U.S. government contractor who leaked documents to the media showing the United States and other national governments had been secretly tapping into personal online accounts to collect information about people around the world. Of the 60 percent to have heard of Snowden, four in 10 (39 percent) have taken steps to protect their online privacy and security as a result of what he revealed.

As noted above, global Internet users appear clearly and cleanly divided into two camps: two-thirds (64 percent) who are more concerned about online privacy today compared to a year ago and the one-third (36 percent) who were not. This is reflected in the fact that 64 percent disagree that private information on the Internet is very secure and 63 percent who also disagree that sharing personal information with private companies online is something that they do all the time (compared to the other 37 percent who do share their personal information with those companies because to them it's not "a big deal").

As a result, many users have taken steps in the past year to self-regulate their own behavior by avoiding certain Internet sites and Web applications (43 percent), changing their password regularly (39 percent), self-censoring what they say online (28 percent), changing who they communicate with (18 percent), closing Facebook and other social media counts, etc., (11 percent) and using the Internet less often (10 percent).

Further, a full majority (73 percent) want their online data and personal information to be physically stored on a secure server and, in particular, in their own country (72 percent).

Governance of the Internet on a local and global basis has been an increasing part of the online dialogue because of these growing concerns among users affected by unwanted and often alarming intrusive behaviors. Various models have been proposed but it's clear that, when tested among global users, it's the multi-stakeholder form of governance – that includes citizens, and not just experts, international institutions or combinations of countries – that has the broadest appeal when it comes to overseeing the running of the Internet (57 percent). This top option is followed by an international body of engineers and technical experts (54 percent), the United Nations (50 percent), international technology companies (49 percent), their own government (47 percent) and the United States (36 percent).

Wariness about the role of governments – including their own – clearly underlies the desire of a majority of Internet users for a broad and more encompassing governance multi-stakeholder body. Only 48 percent believe that their own government today does a very good job of making sure the Internet in their country is safe and secure (compared to 52 percent to disagree). Further, one-third (34 percent) believe that their own government and governments other than their own (43 percent) will restrict access to the Internet.

The importance of the Internet – both today and in the future – for users can't be underestimated: the vast majority (83 percent) believe that affordable access to the Internet should be a basic human right (49 percent strongly). Buttressing this view is the importance that users place for their future in using the Internet for various undertakings. For them, the uses are ranked beginning with accessing information and scientific knowledge (91 percent – very important: 57 percent), followed by personal enjoyment of recreation (87 percent – very important: 47 percent), social communication (85 percent – very important: 48 percent), free-speech of political expression: (83 percent – very important: 47 percent) and their own economic future and livelihood (81 percent – very important: 45 percent).

This survey was conducted by Ipsos on behalf of the Centre for International Governance Innovation. Twenty of the countries utilized the Ipsos Internet panel system while the other four (Kenya, Nigeria, Pakistan and Tunisia) were conducted by Ipsos CATI facilities in each of those countries. In the U.S. and Canada respondents were aged 18-64, and 16-64 in all other countries. Approximately 1,000+ individuals were surveyed in each country and are weighted to match the online population in each country surveyed. The precision of Ipsos online polls are calculated using a credibility interval. In this case, a poll of 1,000 is accurate to +/- 3.5 percentage points. For those surveys conducted by CATI, the accuracy is a margin of error of +/-3.1.

••• employment research

Work-study seems to work

Gallup-Purdue survey shows value of internships

Work and internship opportunities in college that allow students to apply what they learn improve the chances that college graduates will land work after college. As reported by Sean Seymour and Julie Ray, a Gallup-Purdue University study of college graduates finds 71 percent of the most recent graduates who strongly agreed they had these types of jobs or internship opportunities as undergrads are working full time now for an employer, compared with 56 percent of those who strongly disagreed.

Despite the recent drop in the national unemployment rate, the relationship between applied internships and graduate employment may cause some current college students to consider how they focus their time between now and graduation day. While the number of students taking advantage of internships has been rising across campuses, relatively few of all college graduates report participating in these internship or job opportunities.

The "employment benefit" for graduates who strongly agreed they had applied internships or jobs in college exists for all those who have earned their degrees in the past four years – regardless of gender, race, the type of institution they graduated from or whether they are the first in their families to attend college. This reinforces that what students do while in college – and the opportunities their institutions afford them – can be more important than a number of other factors, including the type of school they attend.

These results are based on the Gallup-Purdue Index, a joint research effort with Purdue University and Lumina Foundation to study the relationship between the college experience and college graduates' lives. The Gallup-Purdue Index is a comprehensive, nationally representative study of U.S. college graduates with Internet access. (According to a 2013 Census Bureau report, 90 percent of college graduates in the U.S. have access to the Internet.)

Recent graduates who strongly agreed they had an internship or job where they could apply what they were learning in college are likely to have full-time employment and are also more likely to be engaged at work. Fifty-six percent of employed recent graduates who took part in applied internships are engaged at work – meaning they are involved in and enthusiastic about their work – compared with 33 percent of those who did not.

This higher likelihood of engagement is good for these graduates, because engaged employees feel emotionally connected to the mission and purpose of their work, but it is also good for their employers. Engaged workers are the lifeblood of their organizations. Previous Gallup workplace engagement studies show that business units scoring in the top half of their organization in employee engagement have nearly double the odds of success compared with those in the bottom half.

The potential benefits of applied internships are numerous – these graduates are more likely to feel prepared for life, they are more likely to be employed full time for an employer and they are more likely to be engaged at work. The higher percentage of recent graduates who report taking part in these programs may be a positive sign that more students – and colleges and employers – are beginning to realize the value of these experiences.

Results for this Gallup-Purdue Index study are based on Web interviews conducted February 4-March 7, 2014, with a random sample of 29,560 respondents with a bachelor's degree or higher, aged 18 and older, with Internet access, living in all 50 U.S. states and the District of Columbia. The Gallup-Purdue Index sample was compiled from two sources; the Gallup Panel and the Gallup Daily Tracking survey.

••• automotive research

Report identifies auto marques with gabbiest owners

15 percent of new car buyers account for 59 percent of WOM

The Foresight Research 2014 Word of Mouth Immersion Report shows that among auto owners, MINI, Subaru and Volvo buyers stand out as the most likely to recommend their brand (all at 96 percent). "Word of mouth is a prominent influencer in new auto purchases. Almost one-third of new auto buyers say they were moderately or completely influenced by it, and that can go as high as 45 percent for a highly-influenced brand like Audi," says Nancy Walter, vice president, business development at Foresight.

So who are the people who give advice? Foresight calls them TalkersPlus, a group of highly influential buyers who are 15 percent of the buyer population but generate 59 percent of the word of mouth (WOM). They are more likely to be brand-loyal males who comment about their new vehicle purchase online. They spend $246 more on accessories, are more likely to be influenced by social media, use a mobile device and attend a motorsports event.

To put the giving and getting "sides" of WOM in perspective, Foresight developed the Amplifier Index, which shows the strength of WOM for a brand, segment, or buyer characteristic. The soaring Audi Amplifier Index score of 251 reflects high levels of creating and nurturing brand advocacy. Audi beats out a strong second-place Mercedes-Benz at 2.14 and scores double the industry average of 1.22.

The Amplifier Index for any given brand can be driven more by the giving or the receiving side of WOM. For instance, RAM buyers score an above-average 1.30 Amplifier Index because they advise the most people about car purchases (7.3), while the Subaru buyer 1.61 score is driven by a very-high 43 percent WOM influence.

This report is built from Foresight Research's CHIPS Study, which is conducted annually among 7,500+ recent new auto buyers.

www.foresightresearch.com

••• health care research

A healthy dislike for health insurance shopping

Rather have a tooth filled

Despite government efforts to improve the health insurance exchanges, most Americans still dread shopping for their health insurance, according to a Bankrate.com report. In fact, 82 percent of Americans who recently shopped for health insurance say that it's just as bad as or even worse than doing your own taxes. Seventy-five percent say it's the same or worse than getting the middle seat on a crowded airplane. Even having a tooth filled is better than health plan shopping for some Americans; 23 percent of those who recently shopped for a plan say it was less enjoyable than facing the dentist's drill and 45 percent say it's just as bad (for a total of 68 percent who say it's the same or worse).

Additionally, 32 percent of Americans say they feel "more negative" now than they did a year ago about the Affordable Care Act's impact on their own health care, more than twice as many as the 15 percent who feel "more positive." And almost half (49 percent) of Americans want major or minor changes to be made to Obamacare: 26 percent want to repeal the law completely (down from 30 percent when the same question was asked in June 2014) and only 16 percent want to keep the law as-is.

When it comes to health insurance, more than four in 10 Americans prefer a high-deductible plan with a lower monthly premium, according to the Bankrate.com report. Thirty-six percent of Americans would rather choose a low-deductible plan with a higher monthly bill and 9 percent would not choose either of these two options.

Millennials and Americans with household incomes of $30,000-$49,999 are the most likely to prefer a high-premium/low-deductible plan, while higher income Americans ($50,000 and up) and those ages 30-64 are more likely to prefer a low-premium/high-deductible plan.

The survey was conducted by Princeton Survey Research Associates International, which obtained telephone interviews with a nationally representative sample of 1,004 adults living in the continental United States. Interviews were conducted by landline (502) and cell phone (503, including 291 without a landline phone) in English and Spanish by Princeton Data Source from November 20-23, 2014. Statistical results are weighted to correct known demographic discrepancies. The margin of sampling error is plus or minus 3.5 percentage points.

www.bankrate.com/finance/insurance/health-insurance-poll-1114.aspx

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Product and Service Update

••• research education

Fairleigh Dickinson offers new MR certificate program

Six-course curriculum

In January, the Petrocelli College of Continuing Studies at Fairleigh Dickinson University, Teaneck, N.J., launches a market research certificate program. The six-course professional development program, to be offered in evening classes at the Hackensack, N.J., campus, aims to cover all aspects of market research, including: an overview of market research as an industry and career; qualitative research methods; quantitative research methods; research communications; application of market research to business issues; and a research practicum. Completion of this curriculum will earn the student a professional development Certificate in Market Research consisting of 15 continuing education units.
http://view2.fdu.edu/academics/continuing-education/certificate-in-market-research

quirks.com/articles/2015/20150104

••• neuromarketing

University of Nebraska, iMotions partner for neuro MR lab

Features eye-tracking, EEG and more

The University of Nebraska at Omaha and Copenhagen, Denmark, eye-tracking and biometric software provider iMotions have joined to open a neuromarketing-focused research facility, aimed at studying human responses to online advertising messages. The laboratory will be led by researchers from the College of Business Administration and the College of Information Science and Technology. IMotions has provided the equipment and software for the lab to provide eye-tracking, electroencephalography and the monitoring of pupil dilation, facial expression and skin conductance.

••• pharmaceutical research

Ipsos service evaluates biosimilar pharmaceuticals

Uses syndicated study

Ipsos Healthcare, London, has launched a syndicated project, the Biosimilar Impact Study, to help clients evaluate the strategy of offering copies of rival companies' products as the product patents expire. The new study is designed to gauge perceptions of biosimilar pharmaceuticals and assess physicians' willingness to prescribe them in the U.K., France, Germany, Italy and Spain. Rheumatologists, dermatologists and gastroenterologists will be surveyed. Ipsos plans to extend the project to the U.S. shortly.
www.ipsos-na.com

••• grocery research

Dashboard tracks U.K. supermarket sales

Monitors promotion trends

MySupermarket, a London firm with a supermarket comparison Web site for consumers, has launched mySupermarket Insights, a dashboard that tracks product sales and market share across all the main U.K. supermarkets, along with monitoring promotions and purchasing trends. The data is gathered from more than 50,000 monthly shoppers and 4.5 million visitors to the Web site. MySupermarket is offering a free subscription which allows access to 30 days of information as well as more in-depth data and reports for a monthly fee.
www.mysupermarket-insights.co.uk

••• retailing research

NPD Group tracks market baskets

Draws from longitudinal panels

The NPD Group Inc., a Port Washington, N.Y., researcher, has launched Checkout Tracking, a service based on consumer buying behavior at the market basket level and including both online and brick-and-mortar retail purchases. The service uses data collected from large-scale longitudinal panels, allowing analysis of competitive market baskets and purchase patterns to provide insight

into opportunities to increase market share and improve discounts, promotions and loyalty programs.
www.npd.com

••• mobile research

Kamino tracks mobile device usage

Works as passive monitor

Leeds, U.K., researcher ResearchBods has released Kamino, a passive app that tracks how mobile devices are used, allowing researchers to view consumer behavior in a non-staged environment. Kamino records information such as Web sites visited, including the time and duration of visit; what apps are used, including the time and duration of use; the number and duration of calls and texts; the network provider and the device location, using GPS tracking.
www.researchbods.com/kamino

••• advertising research

Automatix seeks to understand implicit ad messages

Uses avatars, game elements

Conquest, a London research company, has launched a research tool, Automatix, which aims to reveal implicit advertising messages which traditional testing would overlook. Conquest's fast-priming methodology uses speed of reaction and accuracy in a word-association task to obviate the need for explicit questions, with the goal of minimizing cognitive interference, while Conquest's gamified and avatar-led animations present the respondent with a series of online visual metaphors to engage with – allowing attitudes to be expressed without the need for words or numbers. Findings are then merged to construct a more nuanced picture, drilling further into consumers' minds to expose hidden and overlooked associations.
www.conquestuk.com

••• research software

Creative Research Systems releases Survey System 11.0

Allows online dashboard creation

San Francisco-based Creative Research Systems has released version 11.0 of its Survey System software for all types of survey research. Designed to accommodate mobile surveying, the Survey System's responsive survey design uses fonts and graphics tailored to different device characteristics and can convert grid or matrix questions into a series of multiple-choice questions or drop-down lists that are more readable on smartphones. Version 11 lets users create online dashboards that display key reports alongside or above choices for creating custom reports.

The Survey System's offline mobile survey software is used in many remote areas that do not have Internet connections, as well as at malls and other in-town locations. Version 11's Android survey software can now send survey answers directly to a Web site, either at the end of each survey or at a later time when an Internet connection is available. This enables live reports and saves the work of bringing devices to a central location or e-mailing data. Existing users can upgrade to Version 11 for a portion of their original purchase price.
www.surveysystem.com

••• data analysis

Native Atlas.ti version for Mac

Discount for new buyers

Berlin-based Atlas.ti has released a Mac OS X version of its Atlas.ti quantitative analysis software. The new Mac OS X version is available exclusively for Atlas.ti 7. It combines Apple usability with the interface known from Atlas.ti on Windows PCs. The Mac version is included in Windows licenses and will be free for all Atlas.ti users who have already purchased an Atlas.ti 7 license. For those who intend to buy a new Atlas.ti 7 Mac OS X license, there is a special introductory 30 percent discount. The Mac version includes a new user interface, specially designed for Mac OS, and a range of new features like: full unicode support; full-length quotation display in quotation manager; circular and grid layout for the network view; and an undo/redo function.
http://atlasti.com

••• health care research

Physician, recruit thyself

MedQuery debuts doctor recruiting service

Chicago research firm MedQuery is offering Fast-Track Physicians, a service aimed at recruiting any type of physician for a qualitative research study within one week. The process allows physicians to self-screen and schedule themselves using e-mail and text, while researchers and clients monitor the results through a QuickQuest software portal.
www.medqueryinc.com

••• social media research

Facebook opens Rooms

Mobile-only, in-app discussion space

Facebook, Menlo Park, Calif., has released Rooms, a standalone app that provides a mobile-only in-app discussion space about any topic. The Room designer can customize the look and moderation settings, set a screen name for the space and choose who to invite. Participants can share text, photos, videos and comments with others in the Room. They do not need to have a Facebook account or an e-mail address to join; they provide a photo or screenshot of a Room's QR code invite to gain entry. Currently Rooms is available in the U.S., the U.K. and a few other English-speaking countries but only on iOS. An Android version is tentatively planned for early 2015.

••• Briefly

■ Provo, Utah, software firm Qualtrics has released Qualtrics Vocalize, a software platform designed to provide flexible surveys which can be configured and adjusted as needed along with automatic actions and alerts based on location, responses and behaviors. Its dashboard provides information on individual customers as well as the overall project. www.qualtrics.com/vocalize

■ In New York, Nielsen-funded think tank the Council for Research Excellence has released its free guide, Big Data: A Primer for Defining and Implementing Big Data in the Marketing and Advertising Industry. The publication is designed to help executives in the marketing and advertising industries to understand the opportunities and challenges in using big data. It was produced by Gerard Broussard, principal of Pre-Meditated Media, New York, and includes interviews with media and marketing executives on how their companies are using big data. www.researchexcellence.com

■ New York marketing firm Videology will expand its TV Amplifier video advertising platform to incorporate U.K. TV data from New York researcher Nielsen. The expansion, which will join Nielsen's NetView panel – which measures online behavior by demographic, to BARB's TV panel – provides a data connection between TV consumption and online viewing behavior. www.videologygroup.com

■ Shelton, Conn., researcher SSI is expanding its B2B inSSItes program by partnering with Avios, a Cheshire, U.K., travel firm which operates the Avios currency for frequent flyer travel rewards programs in the U.K. and South Africa. Rewards for Thoughts, a program for members of the British Airways Executive Club and Avios Travel Reward Programs, will offer them the opportunity to participate in an online research panel and receive Avios currency for completed surveys. www.rewardsforthoughts.co.uk

■ Google, San Francisco, has added the ability to target users who have purchased a paid app from an in-app display ad. This new feature is available for in-app display ads powered by Google's AdMob network. www.google.com/admob

■ MedePanel, a Hamilton, N.J., researcher, has launched MyHealthOpinion, an online panel for U.S. residents who either have a disorder or are caregivers. The panel captures opinions on health care practices, products and services. MedePanel intends to expand the panel globally. www.medepanel.com

■ Interactive Media In Retail Group (IMRG), a London-based e-commerce industry association, has launched the e-Retail Benchmarking System, to allow online retailers to measure their performances against similar organizations via a PC, tablet or smartphone. The benchmarking system offers up to 12 months of data about average basket, unique visitors, cart abandonment and conversion rates through a personalized dashboard. IMRG partnered with London Internet firm Affino to develop the system. http://benchmarking.imrg.org

■ New York-based AOL has launched its cross-device linking technology in its ONE platform, to allow advertisers to reach customers across devices, enabling "people-centric" marketing rather than "device-centric" marketing. The platform also includes location-based marketing so advertisers can identify the location of potential customers who have been in their stores, across any device. www.aolplatforms.com/one

■ Targetbase, a marketing firm in Irving, Texas, has launched its Targetbase Marketing Platform, designed to make marketers proactive by providing real-time data on marketing campaign performance through a single portal. The Platform facilitates total campaign management across multiple channels and touchpoints along with a 360-degree view of the customer, including transactional, financial, demographic, social and Web behavior data. http://targetbase.com

■ Shelton, Conn., researcher SSI and Univision Communications, the New York media company serving Hispanic consumers, have partnered to create a digital survey panel, ¿Qué Crees? (What do you think?). The panel is designed to connect market researchers to the opinions and attitudes of Hispanic

Americans, who now make up 17 percent of the U.S. population.
www.quecrees.com

■ Sailthru, a New York Internet firm, plans to offer a new service, Sightlines, which uses proprietary software to track Web site, e-mail, mobile and social media to identify a firm's most valuable customers and predict their future actions. These predictions of what and when the customers will make a purchase are geared toward allowing the marketers to send relevant communications. Sightlines is currently in private beta.
www.sailthru.com

■ Procera Networks, a Fremont, Calif., computer networking firm, has launched Video Perspectives, an analytics tool that gives broadband operators a more complete view of the video being viewed by subscribers. The tool is interactive and allows operators to generate custom reports based on specific issues or opportunities.
www.proceranetworks.com

■ Birst, a San Francisco software company, has released its Marketing Analytics Accelerator solution, which unifies online and offline sources of marketing data. The Accelerator includes a pre-built data model that integrates Marketo, Salesforce.com, Google Analytics applications and reports and dashboards. Marketers can access the data through interactive dashboards and visual discovery tools.
www.birst.com

■ Television Audience Measurement Ireland Ltd. (TAM Ireland), Dublin, has launched a pilot project to measure laptop and PC viewing. Sixty homes will serve as an initial test panel as the pilot continues for several months. New York researcher Nielsen will conduct the actual measurement using its Netsight meter. TAM Ireland plans to measure all viewing on all devices by 2017.
www.tamireland.ie

■ Meta, a division of New York marketing firm Kinetic Worldwide, has developed bespoke visualization software, TouchPoints Smart, for the Institute of Practitioners in Advertising, London. The software tracks previously unavailable smartphone data, including calls, texts, apps and Web sites viewed by the user, track how these change during the day and provide summary charts according to the selected audience.

■ Nuremberg, Germany, research company the GfK Group has launched FutureWave, a methodology designed to enable companies to predict changes to their market, product or service by linking consumer needs to market activity.
www.gfk.com/futurewave

■ Retailigence, a San Francisco Internet firm, is partnering with Gimbal, a San Diego mobile technology firm, to deliver personalized content to shoppers' mobile devices. The process utilizes inventory data gathered by Retailigence to deliver messages to location-enabled devices as they come into range of Gimbal's proximity beacons.
www.retailigence.com

■ Twitter, San Francisco, has extended access to its self-service advertising platform to Norway, Sweden, Finland, Denmark, New Zealand and Singapore. Its full-service ad targeting network is now available to 35 markets in Europe, the Middle East and Africa.

■ Reston, Va., research company comScore and Lotame, a Columbia, Md., Internet firm, have partnered to integrate the Digital Analytix platform of comScore with the Data Management Platform of Lotame. The combination allows joint clients to expand their custom segments with user behavior data across platforms and channels, leading to better targeted and relevant ads.
www.lotame.com

■ Dobney Research, Bristol, U.K., has launched Cxoice, a non-linear questionnaire Web survey software. Its non-linear nature allows respondents to create their own route through the questionnaire, in theory making the survey more engaging.
www.dobney.com

■ London-based researcher Demographix has added a weighting tool to its suite of analysis products to provide a variety of available weights for a survey and the ability to view the weighted analysis of the responses side-by-side with the unweighted analysis. The tool is being provided at no extra cost to customers and complements the company's current tools, Derived Variables, Crosstabs and Filters.
www.demographix.com

■ SurveyMonkey, Palo Alto, Calif., has extended its Audience sampling service to the U.K. The service provides businesses with online access to a consumer panel of tens of thousands respondents, with the ability to specify desired demographics. It is part of the broader SurveyMonkey platform and has been available in the U.S. since 2012.
www.surveymonkey.com

■ YouGov, a London research firm, has launched a new audience segmentation and media planning tool, YouGov Profiles, that examines the media use of 200,000 of its U.K. panelists and joins this information with 120,000 demographic and lifestyle data points. The methodology is designed to identify personal attributes such as musical preferences and personality type.
http://yougov.co.uk

■ Nuremberg, Germany, researcher GfK has launched a new model to predict company-level loyalty scores, incorporating its new "emotional imprint" measurement with customer advocacy and other performance indi-

cators. The new model is designed to show that strong emotional imprints lead to lower rates of customer churn and more positive word of mouth.
www.gfk.com

■ Minneapolis information technology firm Avtex has expanded its suite of customer experience consulting services to include quantitative surveys, qualitative interviewing and focus groups plus voice of the customer analysis and management, customer loyalty and satisfaction measurements and competitive benchmarking.
www.avtex.com

■ Versta Research, Evanston, Ill., has partnered with San Francisco management firm Brilliant Ink to produce a new Employee Experience Assessment tool. The tool can be geared toward the needs, size and population of the company and aims to help them develop an action plan to improve employee engagement and satisfaction.
www.brilliantink.net

■ Attensity has updated its Attensity Q software with tools to analyze online conversations and pull out emerging themes, trends, anomalies and events related to a main topic. The new Attensity Q 1.1.0 is equipped with sentiment analysis, trend analysis, influencer analysis, geo-spatial analysis and topic-based analysis.
www.attensity.com

■ Online panel services provider Borderless Access has launched panels in Australia, Singapore and Thailand.
www.borderlessaccess.com

■ Denver research firm iModerate is partnering with Luminoso, a Cambridge, Mass., software company which specializes in organizing and interpreting consumer feedback. IModerate will incorporate the Luminoso platform into the newest iModerate software, including (iM)merse Longitudinal and (iM)merge Analytics. (iM)merse was formerly known as Qual Tracker.
www.imoderate.com

■ Civicom Marketing Research Services has expanded its Chatterbox platform with analytics tools to allow researchers to gather feedback from respondents, print transcripts and synthesize data for speedier analysis and reporting.
www.civi.com

■ Reston, Va., researcher comScore has partnered with mobile media companies to act as tagging partners for comScore's validated Campaign Essentials Mobile (vCE Mobile) software. The partnerships will allow comScore to provide measurements of mobile advertising delivered in applications as well as browsers. The current authorized partners include AdColony, Addictive Mobility, BrightRoll, IgnitionOne, Kargo, Kiip, Netmining, NinthDecimal, Rhythm, RUN and Tremor Video, with more to be added.
www.comscore.com

■ The U.K. Audit Bureau of Circulations has awarded its new viewability certification to comScore, for its validated Campaign Essentials (vCE), DoubleVerify, for its DV Impression Quality suite, and Moat, for its Moat for Attention Metrics. The Integral Ad Science system for calculating viewability was also certified. The certification program is based on industry testing principles which include both PCs and Macs on a variety of common browsers. It complements the work of the U.S. Media Rating Council, which has already accredited comScore, Integral Ad Science and DoubleVerify, among others.

■ The Interactive Advertising Bureau (IAB), New York, has launched the IAB Digital Video Center of Excellence. The new unit is designed to promote development of digital video by producing research projects, case studies and creative showcases. It will also develop technical standards and best practice identification. Its European partner, the Interactive Advertising Bureau Europe (IAB Europe), Brussels, has opened its own Multi-Device and Connected World Library of Research, designed to showcase the best practice multi-device and cross market studies. The selected studies will explore the use of TVs, PCs, laptops, tablets, mobiles and smartphones and how the devices are used during the day and in combination.

■ In Mumbai, India, New York researcher Nielsen has opened its first neuromarketing laboratory in the country.

■ CivicScience, a Pittsburgh, Pa., research firm, has issued a free e-book of consumer information, 75 Show-Stopping Media Consumption Insights, which provides insights about digital users, such as daily Facebook users being 43 percent more likely than the general population to smoke and 33 percent more likely to eat breakfast on the road or at work.
biz.civicscience.com

■ SiriusDecisions, a Wilton, Conn., research firm, has released its report SiriusView: Social Media Intelligence 2015, which is offers an overview of what customers should consider when evaluating b-to-b social media intelligence (SMI) solutions. The report also covers current trends impacting the SMI marketplace, including mergers within the market, varying target audiences and the relative connection between social media and the buying process.
siriusdecisionspillars.com

■ VIA University College, Denmark,

has joined with crowdsourcing marketing firm Chaordix, Calgary, Canada, to create VIA Connect, designed to be an innovation community connecting businesses with students, researchers and tutors. Public and private organizations will be invited to share challenges with the VIA Connect community members who can respond with ideas and innovations to solve them.

■ Chicago research firm Euromonitor International has released a free e-book, Succeed in Emerging Markets: Selection, Strategy and First Steps. It delineates areas needing consideration, including: the stability and size of the market; the demographics of the population; the degree of access and the business environment, along with emphasizing that market entry strategy must be tailored on a case-by-case basis.
http://go.euromonitor.com/succeed-emerging-markets-selection-strategy-first-steps.html

■ In Washington, D.C., MarketResearch.com has published a free market research e-book, How to Succeed Using Market Research.
http://hubs.ly/yojFFdo

■ The Federation of Small Businesses (FSB), a nonprofit headquartered in Blackpool, U.K., has launched Big Voice, a research community for small businesses. Run by London research firm Verve, Big Voice will focus on issues such as broadband, access to finance, employment, pensions, taxes and other issues relevant to small businesses. The FSB has around 200,000 members.

■ Special Olympics, Washington, D.C., and New York researcher Nielsen are partnering to explore the purchasing power of people with intellectual disabilities. Nielsen will measure and profile adults with these disabilities as part of their work to build understanding, awareness and impact for Special Olympics worldwide.

■ Promise, a project management tool and part of the ctOS (Cross-Tab Optimizer Suite) of Cross-Tab Marketing Services, Mumbai, India, has been released. It is designed to reduce project turnaround time by automating workflow paths and to optimizing resource allocation, aiming to reduce internal error rates by 80 percent. It is geared to integrate with various industry tools and survey platforms.
www.cross-tab.com

case study

••• gamification research

Game on

How game-enhanced design can improve respondent satisfaction and data quality

| By Trish Doran and Shellie Yule

snapshot

JP Morgan Chase and Socratic Technologies explore findings from their research-on-research case study on the merits of gamifying surveys.

quirks.com/articles/2015/20150106

Surveys remain the No. 1 source of data for market researchers. But over the past 20 years, response rates, respondents satisfaction and data quality have seen continued steady decline. There are many contributors to waning response rates, from busy lives to social media to researchers not keeping pace with the interactivity now readily available through advanced technologies.

Surveys are generally boring (say this to an audience of market researchers and the unease is palpable) and most are still conducted through basic interfaces with little or no use of engaging graphics or other interactive elements. With more respondents straightlining and less differentiation across attribute ratings, data quality is increasingly at risk.

Change is needed but a change to what? For the last decade, gamification has been looked to as the solution; however, the implementation of game-enhanced surveys has been choppy at best and there's a lingering knowledge void around its effectiveness. This is partly because there are many ways to gamify but there isn't a clear roadmap to which methods are superior. For example, it's known that earning badges, scoring points and accumulating in-survey "rewards" may offer a better user experience than plain text with radio buttons but this may put respondents in a gaming mind-set and can lead to a focus on winning rather than providing accurate results. Then there's the immersive approach, called context gamification, which turns the entire survey into a video game. While that can be engaging, it tends to overwhelm the research.

The sweet spot seems to be an approach called functionally visual gamification, which is loosely defined as a mix of game elements that inject fun (yes, fun) into the survey, meaningfully increase subject matter comprehension, mitigate fatigue and do not threaten research objectives.

Previous research published by academic research gurus and Socratic Technologies has indicated that interactive and engaging surveys keep respondents engaged longer, lead to greater respondent satisfaction with the survey process, instill the feeling that "this activ-

ity was worth my time" and measurably increase future survey participation rates. But what else could be gained by creating a thoughtful and engaging survey-taking experience?

Increase engagement

We set out to determine whether game-enhanced elements in a survey could increase engagement; whether interactive elements would heighten the user experience as reflected in self-reported satisfaction and how, if at all, they would impact data quality.

Our hypothesis is that the engaged version of the survey will result in higher levels of self-reported satisfaction and better data quality.

We conducted an online study and presented our findings at the Market Research Event in October 2014. In the experimental design, one set of respondents went through a standard version of the survey, while the other set went through a game-enhanced version of the same survey. The survey comprised three distinct sections and in each one, the game-enhanced version included an interactive element.

Stimuli	Standard Version	Game-Enhanced Version
Concept Exposure	Text Description	Animation
Open-End	Text Prompt	Online Collage and Prompt
Appeal	Appeal Matrix	Card Sort

To measure self-reported satisfaction, at the end of each section of the survey, respondents were asked the following questions (scaled response, agree/disagree):

- This section of the survey was interesting to me
- The questions asked in this section were easy to understand
- This section of the survey was fun to complete

For data quality, we established a range of metrics, including: straightlining and responses to red herring questions; comprehension; and word count and quality of open-end responses.

A sample of N=1,100 respondents were equally divided and randomly assigned into two cells and the sample was balanced to ensure comparable demographic distribution. Screening requirements were as follows: age 18+; no sensitive industries; primary or shared responsibility for decisions in household; annual household income greater than $25,000; and several other qualification criteria for the main topic of the test survey.

Ultimately, the goal of our experiment was to understand if gamified elements have an impact on respondent satisfaction and data quality.

The answer, in short, is yes.

Adequately describe

One of the challenges with concept testing is the ability to adequately describe the product/service being tested so that consumers are able to offer an authentic assessment of their interest. When respondents are exposed to a complicated concept using only text, we tend to see more "don't know" responses, which may be indicative of indifference or, more likely, a lack of comprehension. This section of the survey was designed to test the impact of a game-enhanced element (an animation) on data quality, measured by definitive responses to call-to-action and comprehension questions, and respondent satisfaction.

Respondents in both groups were exposed to a complicated financial instrument – an exchange traded fund (ETF). In the standard survey, respondents read through the text description. In the game-enhanced version, they were shown an animation in which the same text was used but images brought the description to life (Figure 1).

After seeing the text description or the animation about ETFs, respondents were then asked a series of questions about their understanding of and interest in ETFs.

The differences between the two groups were significant. In the game-enhanced group, answers on call-to-action questions, such as seeking more information or consideration, were more concrete and the number of equivocal responses was significantly lower.

Additionally, game-enhanced respondents showed a significantly higher comprehension of

Figure 1

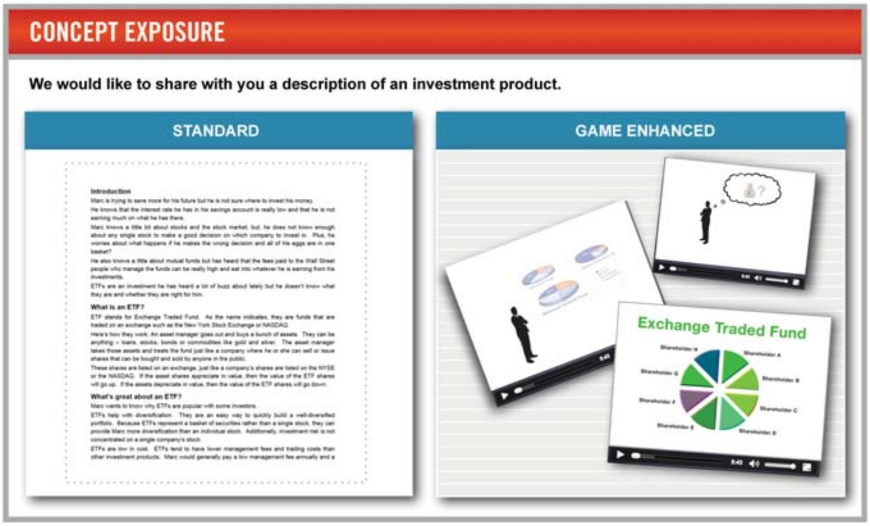


Figure 2

ETFs. The game-enhanced respondents displayed a better understanding of key aspects of ETFs that were part of the concept exposure, such as when ETFs can be purchased and how ETFs differ from stocks (see Figure 2).

On the self-reported satisfaction metrics, significantly more of the respondents who went through the game-enhanced version said the section was interesting, easy to understand and fun to complete. That more of the game-enhanced respondents rated this as "fun" is even more notable given the extra time it took for them to watch the animation, compared to reading (or merely skimming) the text-based description. They gave us more of their time and enjoyed it more.

Beyond a cursory response

An ongoing challenge with online research is enticing respondents to give anything beyond a cursory response to an open-ended question. When reviewing verbatims, it is not uncommon to encounter (disappointingly) short answers.

Respondents in the standard group were asked to describe their feelings about investing in the post-recession economic climate. In the game-enhanced version, we used an interactive collage exercise (Figure 3). Collage-building is a traditional in-person qualitative technique that is used to help engage participants and reveal deeper sentiments about the topic at hand and this approach translates nicely to an online setting. The game-enhanced group was asked to create a collage of images that represented their feelings about post-recession investing, and then to write about their collage.

Again, we saw significant differences between the two groups. Those who went through the standard version of the survey provided an average of 16 words, while those who went through the game-enhanced version averaged 44 percent more words! Equally, if not more important, the qualitative differences between the two groups were also notable – the collage descriptions provided a much richer narrative.

Sample verbatim response from standard version: "*I am more cautious in investing and worry about interest rates being so low.*"

Sample verbatim response from the collage-builder approach: "*I am too scared after the 2008 downturn to invest my money. I feel like I already have a small amount of money to start with hence my empty pockets selection, that I would be taking a gamble if I did invest because what would happen? I feel like I'd look like the guy in the picture and need to be thrown a lifeline and the monkey's face represents how I would feel losing money.*"

For the self-reported metrics, the game-enhanced version was significantly higher on the "fun" metric. Again, the game-enhanced version took longer and was still rated as more enjoyable.

Rate the appeal

In a section using a drag-and-drop module, we told respondents that a credit card company is creating a new design for the appearance of their cards and wanted to understand which images would be most appealing. For each card image, we asked them to rate the appeal of the card images.

As shown in Figure 4, in the standard version, the card image was on the left side of the screen and a rating scale was on the right side. For the game-enhanced version, we used a drag-and-drop instead of a simple scaled question. With this approach, respondents dragged images into "rating buckets."

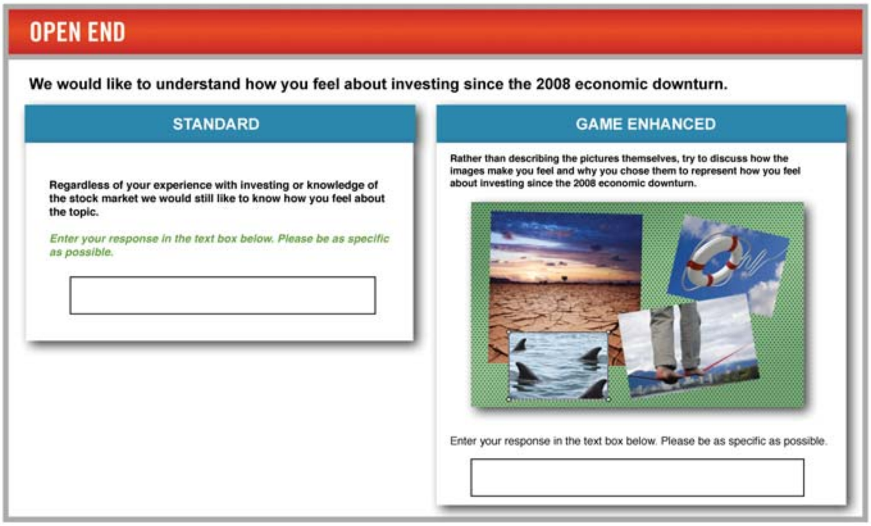
We did not find any differences in the self-reported metrics. Both sections were rated equally on ease of understanding, interest and "fun to complete."

Considering both approaches side by side, one possible explanation may to be that drag-and-drop has been around for many years, so familiarity has lessened its impact on the respondent experience. This supports the idea that gaming tools should be thoughtfully chosen for relevance to have optimal impact.

Additional time

One of the very real considerations when adding game-enhanced elements to a survey is the additional time that they require, which can be challenging given the struggle to

Figure 3



balance extracting the most from a survey opportunity while managing respondent burden. One of the most compelling findings from this research is around how the game elements impact respondents' perception of time (Figure 5). Respondents who took the standard version of the survey perceived the survey as taking slightly less time than it did (about 8 percent less). But the game-enhanced group perceived having spent 28 percent less time completing the survey than they actually did. Perhaps this is corollary on the "Time flies when you're having fun" axiom but it represents a very real opportunity on which market researchers can capitalize.

We also looked at what, if any, impact game-enhanced elements had on different types of survey takers, specifically people who take surveys infrequently compared to those who frequently participate. It's worth noting that across the board, infrequent survey-takers were far more enamored of the game-enhanced version than the standard version. This has immense implications for surveying client sample, who are likely to be infrequent survey-takers.

Results are clear

We set out to test the impact of game-enhanced elements on respondent experiences and data quality. The results are clear: game-enhanced design improves the respondent experience and can positively impact data quality. We also discovered that less-frequent survey takers are especially delighted by game-enhanced elements and that game-enhancements reduce the perceived survey burden with perceived shorter survey length. We do recognize that adding gaming elements could affect benchmarks but the benefit will far outweigh this short-term burden.

Figure 4

Figure 5

However, we do see gamification as a toolbox of techniques and we need to choose each technique appropriately.

Here are the guidelines from our research:

- Comprehension of complex concepts and overall data quality can be higher when using game-enhanced techniques. Having better-informed respondents leads to better data quality which leads to better business decisions.
- Gamification exercises need to be used appropriately. Game elements can be used on individual questions, challenging respondents to think creatively and spend time constructing insightful responses; however, the game should not overwhelm the goals.
- While we as an industry should be using gamification tools more frequently, we need to also be considering their efficacy. Drag-and-drop was less effective in producing differences between the survey experiences but it is also one of the oldest forms of gamification. Keep up with the times!
- Game-enhanced questions can have a stronger impact on those who take surveys infrequently, netting higher levels of comprehension, satisfaction and overall quality of data from the group whose feedback we often need the most – the less-frequent survey-takers (e.g., customers!).
- Gamification techniques can re-engage respondents, help reignite interest and counteract survey fatigue.

Furthermore, as the rise of technology continues, research platforms will need to keep pace. There seems to be little doubt that surveys will need to be more visual and interactive to keep respondent interest. There are plenty of examples of design cues from outside the industry.

Creating enjoyable survey experiences is beneficial to the entire research ecosystem. Clients and suppliers gain from the improved data quality and richer responses and from respondent willingness to continue to participating in research. If well-designed, game-enhanced surveys became the general rule rather than the exception, everyone involved would benefit.

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quirks.com/articles/2015/20150107

••• qualitative research

Two paths to the same place

How neuromarketing and qualitative research can form a beautiful friendship

| By Anna Janska

snapshot

Anna Janska explains how qualitative research enhances data from neuromarketing research methods by providing a crucial facet: context.

As qualitative researchers, we repeatedly have to fend for our space. Once in a while we find ourselves in a conversation with someone who does not have a clear understanding of qual and who will question us as to how we can ensure that our sample is representative, that our data are valid, since the procedure is not 100-percent identical between groups/interviews/ethnos, if our data are replicable, if we do any statistical testing, etc., etc. In short: how qual can adhere to the standards of quant. By now, we have our answer ready: Qual has its own rules and standards, based on thoroughly understanding what our interlocutors think and what makes them tick.

These days, this very notion is being threatened by neuromarketing.

Neuromarketing argues that we cannot understand what people think by just asking them, as participants cannot articulate why they make decisions or prefer one product over another. Instead, these processes happen on a

hidden, unconscious layer. So neuromarketing in a way circumvents the participants as informants and asks the origin, their brains, directly.

Neuromarketing is still a young field and accounts of its limits and usages still differ significantly. The largest common denominator is: Neuromarketing is the application of neuro-imaging techniques to marketing research questions. It is a spin-off of neuroscience, which itself is a multi-disciplinary field uniting scientists from biology, psychology, medicine, physics, chemistry, mathematics, linguistics and informatics. What they have in common is their interest in some characteristic or function of the brain.

As old as humankind

Our fascination with our brains is probably as old as humankind. Earliest evidence for surgery on living humans' skulls dates back to the Mesolithic Age: In the Dnieper Rapids region in the Ukraine, skulls between 8,000 to 9,000 years old have been excavated that had surgically-created holes in them, probably by drilling in the skull. Remarkably, these patients survived surgery long enough for the bone to start healing around the holes!

In ancient Greece, Hippocrates thought that all emotional, sensory and cognitive functions are rooted in the brain. Aristotle, however, thought that the main function of the brain was to cool the blood. The blood, he thought, was in turn warmed by the heart, inside of which the soul lay and where all sensations were located.

Fast-forward to the Renaissance: The invention of hydraulic machines lent itself to the belief that the human body functioned in the same manner. René Descartes introduced mind-body dualism: The body is a physical entity working like a machine, while the mind is a separate, non-physical entity which, as a consequence, cannot be understood by studying the human body. It was the mind, he reasoned, that distinguished humans from animals. Neuroscience today in fact assumes a monoism, rather than a dualism, postulating that physical investigation can give us insights into the mind; the mind and the brain are one, since "the mind is what the brain does," as the psychologist Stephen Pinker puts it. Thus conversely, by understanding the brain, we should be able to infer what is going on in the mind.

By the end of the nineteenth century the brain had been dissected extensively. It was observed that all human brains had comparable structures, which gave rise to the suspicion that each bit of brain was home to a specific function.

Localization of brain functions made good progress by observing how behavior is affected when a part of the brain is damaged. One such famous case is that of Phineas Gage, a 25-year-old railway worker who suffered a tragic brain injury in Vermont in 1848. In an explosion, a metal spike shot through his skull and brain. Miraculously, he survived and was physically and mentally fully functional. His personality, however, had been changed dramatically. Once a responsible, balanced, earnest young man, Gage became impulsive and irresponsible and did not adhere to social norms, so that his friends felt that he was no longer himself. This accident provided evidence that our personality sits in our brains.

Brain localization became more concrete through Paul Broca. His famous patient, Monsieur Leborgne, whom he met in 1861, could only say the syllable "tan" for several years but could vary the intonation with which he did so. Broca understood this case as a window to understanding the localization of speech. An autopsy revealed damage to Leborgne's left frontal lobe. Over the next years Broca documented several similar cases with comparable symptoms and damage to the left side of the brain. This marked a turning point in localizing the function of speech in the brain (and led to Broca having a region of the frontal lobe named after him).

Shortly after, Carl Wernicke observed that damages to other parts of the brain could also affect language, however, it did not affect speech production. Broca's area, he argued, is responsible for the physical movements necessary to produce speech. Other areas involved in language are areas of understanding speech and selecting the right words. Patients with impairments in these areas might speak fluently, yet the words they string together do not make any sense.

These observations show that specific functions, such as language, do not "live" in one specific region of the brain. Instead, they rely on the workings of several connected areas. In fact, many brain regions even have more than one function.

Although we have just breezed through 8,000 years of human interest in the brain, neuroscience is a fairly young science that has only emerged as a distinct discipline in the late 1950s-early 1960s. It is not a coincidence that the last 50 years have seen a surge in interest and discoveries in the brain: Revolutionary discoveries about the brain's structure and function have been made possible by the inventions of new methods: EEG, MEG, PET, fMRI and TMS. Up until that point, neuroscientists were dependent on accidents to localize human brain function. Sophie Scott, neuroscience professor at University College London, argues that if we map our quest towards knowing everything there is to know about the human brain onto a 24-hour day, we are only at the very beginning, maybe two minutes into that day. As one of neuroscience's newer daughter disciplines, neuromarketing is probably only a second into that day.

Mixed bag of methods

The methods neuromarketing employs are as heterogeneous as the discipline itself. *Neuromarketing for Dummies* (you know a topic has entered mainstream when there is a *for Dummies* book on it) names a mixed bag of methods, such as EEG, fMRI, eye-tracking, skin conductance, heart rate measurements and response times. These physical response measurements vary in the immediacy by which they monitor changes in mental states.

The method which probably has captured the imagination of the general public most is functional magnetic resonance imaging (fMRI), as it generates images that allow us to see brain activation. In fact, David McCabe and Alan Castel found that people rated articles illustrated with fMRI scans as more credible in their scientific reasoning than the very same articles accompanied by topographical maps, bar charts, news pictures or no pictures at all.

FMRI uses the electromagnetic properties of blood to depict brain function:

the protons inside the atoms in our body spin (i.e., they rotate around their own axis). You can picture this movement like the Earth turning around its axis. This spinning motion creates a tiny magnetic field, which MRI scanners can pick up. Oxygenated blood has different magnetic properties than deoxygenated blood, so the two can easily be distinguished. BOLD (blood oxygen level-dependent) fMRI or BOLD contrast relies on the assumption that activated brain areas need more oxygen and so oxygenated blood rushes into them. By identifying areas that are supplied with lots of oxygenated blood, areas of increased activation are identified.

You probably have come across images of such activation patterns, where colorful blobs are superimposed on images of black-and-white brains. The areas that are highlighted are areas that are more active in one condition compared to the control condition (or the baseline, i.e., when a participant lies in the scanner and does not perform the task). In other words, the blobs you see in an fMRI picture are not the only areas that active in your brain; they are rather areas in the brain that are significantly more active in one experimental condition than in another (thus the name BOLD contrast).

To illustrate how this method can be applied to questions of consumer behavior, let us look at a study Plassmann and colleagues published in 2008 in the *Proceedings of the National Academy of Sciences*. They used fMRI to investigate how the price of a bottle of wine influences the level of enjoyment a participant derives from tasting it. Experimental participants were told that they would be sampling five different wines. Participants lay in an MRT scanner, which is a large metal tube, with their head fixated, as it is imperative for fMRI image generation that all movement is avoided. The price of the wine was shown as a projection inside the participant's visual field and then a little bit of wine was squirted into a participant's mouth through a straw. In addition to the fMRI measurements, participants were asked to indicate by button presses how much they enjoyed each wine they tasted. In fact, participants tasted only three wines, not five, as announced. Two of the three wines were tasted twice – once labeled as a cheap wine and once as a more expensive wine.

As we would probably expect from our own research practice, participants rated the enjoyment of the wine significantly higher if the price tag on the tasted wine was higher. Neuroscience can shed some light on why that is, even when the participants themselves are unable to tell. Enjoyment correlates with activation increases in the medial orbitofrontal cortex (mOFC), an area associated with the experience of pleasure. Areas immediately responsible for taste perception, however, did not show any difference like that. So the expectation of enjoyment effects the actual experience of enjoyment but not taste perception itself. Thus, neuroscience offers us an answer to why that qual cannot attain.

Herald the death of qual?

Does neuromarketing herald the death of qual? Hardly. As with quant and qual, there are two different standards for good research at work, each of which has its own affordances.

The more precise a method is and the smaller the distinctions it makes are, the more control over the experimental parameters are needed to ensure that effects found are not just a fluke. Physiological measurements, as used in neuromarketing, are small changes that do not speak for themselves, but rely on a number of processing steps and statistical analyses. Just conducting an fMRI experiment to "see which areas light up" is highly problematic. If a large number of comparisons are made, chances of seeing a difference increase, just because of the sheer quantity of comparisons. This can lead one to falsely assume that two conditions are different when they are not. A typical approach to compensate for that risk is to acknowledge it by being stricter when evaluating differences between conditions. So for every additional investigated contrast, the difference between conditions needs to be a bit more pronounced to be considered a real effect.

This issue is demonstrated by an experiment published in the *Journal of Serendipitous and Unexpected Results*. Craig Bennett and his colleagues conducted the experiment to caution against the dangers of negligent use of statistical evaluation. The experimental setup and reporting procedure of the fMRI experiment were according to standard protocol, while the statistical evaluation was somewhat dubious, though not unprecedented. A large number of statistical comparisons were run without adjusting for it.

It is the delicate detail of their choice of experimental participant that emphasized the absurdity of conclusions drawn from such analyses: A dead fish. The researchers put a dead salmon in an fMRI scanner and told it to guess what emotions humans on projected pictures were experiencing. Their results showed that some brain regions in the dead salmon were more active during this task than when the fish just lay in the scanner and relaxed. Obviously, the scientists did not discover cognition in a dead fish but revealed fishy statistics, instead.

Thus, it makes sense to only conduct a few hypothesis-guided comparisons. A hypothesis is an educated guess, such as: More-expensive wine is enjoyed more than cheaper wine. An experiment is then conducted to see if the gathered data support or falsify the hypotheses. To do this, the experimenter needs to define how "is enjoyed more" would manifest itself in fMRI data. In the wine example, this was activation changes in the mOFC. Activation of this area is compared across experimental conditions. The hypotheses are then answered as a series of yes/no questions: Is Area X in Condition Y more active than in Condition Z? Or does activation in Area X correlate with Parameter Y (e.g., price)?

One additional safety net to avoid spurious results is to gather additional behavioral responses to help with the interpretation of neuroscientific data, such as the enjoyment ratings used in the wine study. It would be an oversimplification to assume that only by observing activation in a single area can conclusions about a participant's mental state be drawn. While complex functions like language are not constrained to a single area (but are rather the result of the collaboration of several areas), one area often has more than a single function, so that its involvement cannot tell us anything definitive about a participant's mental state.

Author Martin Lindstrom told us a few years ago that we "loved" our iPhones – "literally." In an fMRI study participants were shown videos of iPhones or played the ring tone. Activation in the insular cortex was found, which is "associated with feelings of love and compassion. The subjects' brains responded to the sound of their phones as they would respond to the presence or proximity of a girlfriend, boyfriend or family member." However the insular cortex has more than one function. The insula does lots of things, only one of which is experiencing feelings of love. Other emotions it is involved in are happiness, fear and disgust. As such, one could just as well infer that you are disgusted by your iPhone.

Qual is not subject to equally strict constraints, as it does not record miniscule changes in physical responses. Instead, it is storytelling that qual excels at. It does not need to eliminate as much variation between participants as possible but instead revels in it. Qual can look at the bigger picture and create the story as a meaning-infused entity.

Let's return to the wine-tasting example. Qual fails to disentangle expectation of enjoyment and taste, so indeed, it cannot answer that question of why a particular wine is enjoyed. Yet, qual still has the card of contextualization up its sleeve: It can investigate how a wine is enjoyed. It can meet participants in their natural habitat and understand the situations that generate rituals. What are situations that call for a bottle of wine? What are the places where a more expensive bottle of wine is bought? How is it served? What makes a special evening for the individual?

While neuromarketing attempts to get closer to the real answer by asking a participant's body, qual approaches the consumer by entering their living situations and their realities.

The other trump of qual is its openness – it is free of the constraints imposed by standardization. Thus qual cannot only explore variation across a dimension (such as price) but set out to explore the dimensions that shape consumers' worlds. Qual is open for serendipity and cherishes the element of surprise that is at the heart of new knowledge. A stance of openness and empathy in the researcher allows an interaction with the consumer at the eye level, which lets the consumer show the researcher their truth, rather than attempt to answer questions to specific fragments of it. The researcher can thus understand the consumer as a complete human being rather than a data point. We must not forget that this empathy is also desperately needed in order to further marketing decisions, as effective marketing must address the human consumers who use the products and services. The currency of qual is thus not so much a consumer's perception but their (inter)actions with their surroundings and the contexts that shape them.

Both want to understand

The overlap between neuromarketing and qual is that they both want to understand the consumer. The angle, however, is a completely different one, so that they should be seen as informing, rather than cannibalizing, each other.

Neuroscientific methods can greatly help us to understand the human mind. How are decisions made? What aspects play into the decision-making process? What weight is given to individual factors of the decision? Knowledge of how the human brain, memory and decision-making work can truly help us to sidestep errors in our research design and in our interpretation of data. For that, however, there is no need for us qual researchers to conduct studies ourselves. Neuromarketing can in turn rely on findings of qual that identified relevant dimensions to explore further. There is real potential for a mutually enriching relationship here. I think this is the beginning of a beautiful friendship.

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••• eye-tracking

What we've learned so far

Linking eye-tracking, emotional measurement and packaging research

| By Scott Young

snapshot

Scott Young offers guidelines for incorporating emotional measurement within packaging and shopper studies.

Few would dispute that emotion plays an important role in shopping and packaging. In a world of overwhelming choice down every aisle, it's clear that shoppers can't consider all options or rely solely on rational, fact-based product comparisons. Instead, they need to sort through items quickly and the brands and packages that break through visually and make an immediate visceral connection are most likely to end up in the shopping cart. In addition, we all know that what shoppers say is not always reflective of what they do – and that people often face barriers in verbalizing their true feelings (the desire not to offend, to offer socially acceptable responses, etc.).

For these reasons, our firm has long relied mainly on behavioral System 1 measures (including eye-tracking, shopping and product findability exercises from store shelves) rather than direct questioning to assess new packaging and merchandising systems. More recently, we've explored a variety of approaches (including neuroscience, facial coding and visual images) to bring emotional measurement to packaging and shopper research. In fact, over the past five years, we've conducted over 50 studies in which these measures have been gathered in addition to our established, validated metrics of packaging and point-of-sale effectiveness.

From these studies, we've learned a good deal about the role of emotion in packaging (and shopping) and we've gathered hands-on experience regarding the strengths and limitations of different approaches to emotional measurement. In this article, we'll share our perspective on these issues and speak to their implications.

Three core objectives

As we embarked on our exploration, we identified three core objectives or ways that emotional measurement could potentially enhance our work and ultimately help our clients to win at retail:

- **As part of pre-design research, to inspire and guide exploration** – identifying

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- eye tracking technology)
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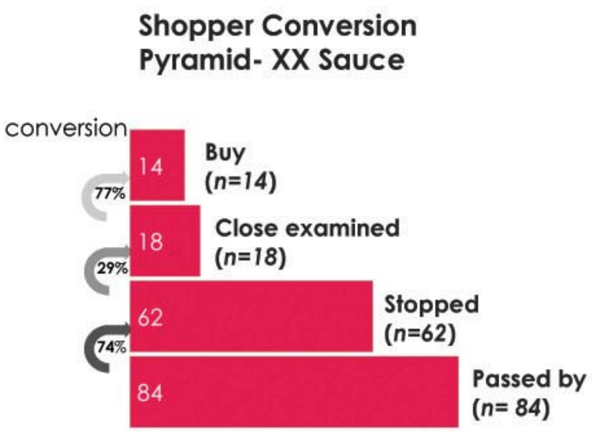
- Visual element playback
- Competitive imagery
- Intent to purchase, act or consider
- Likability
- Impact of price
- Client-customized diagnostics.



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emotionally compelling messaging and visual imagery, which could then be integrated within packaging and shopper marketing efforts.

- **As part of screening a range of new creative directions** – diagnosing specific elements that drive shoppers' positive and negative reactions, to guide enhancements and develop stronger designs.

- **As part of on-shelf validation testing** – adding an emotional dimension to our validation studies to make them even more predictive of in-market performance.

Across these objectives, our focus was on understanding how best to integrate emotional or non-conscious measurement to our established behavioral and attitudinal metrics. One specific goal was to link emotional measurement directly with eye-tracking, to better document and understand the connection between what people see (as they shop and consider packs) and what they feel.

However, in pursuing these objectives, we faced two fundamental challenges, tied to the nature of packaging and shopping itself.

First, the intensity and nature of emotion evoked by packaging (and shopping) is typically more limited than that of advertising or digital content.

Generally speaking, still images (particularly small images on packs) evoke far less emotional response than moving images (such as those in commercials, movie trailers, etc.), which can use content and sound to tell a story. For example, think of the emotion driven by the Dove Campaign for Real Beauty advertising, as opposed to an individual Dove package. In addition, commercials (unlike packages) have predefined time sequences, which facilitate measurement, as researchers know exactly what was on-screen at the 10-second mark.

As importantly, the reality is that shopping for many products (particularly weekly staples found in grocery, drug and mass stores) is more habitual and task-oriented than experiential – and thus, the strongest emotion is often frustration, when shoppers are confused or can't find their desired product. In fact, packaging is arguably the most functional or literal of media, as it is closest to the actual purchase decision. At this "final five feet" of marketing, the top priority is often to deliver the key product information (quantity, form, flavor, etc.) needed to close sale and packages are often constrained by these informational responsibilities (and their limited size).

Second, the range of stimuli encountered during an in-store shopping experience is far broader than that encountered while watching a commercial or visiting a Web site.

In a trip down the aisle, shoppers encounter not only thousands of packs but also myriad additional stimuli, ranging from music to store announcements and other shoppers. This makes it extremely difficult to identify/isolate causality (What is driving an emotional reaction?), even when the combination of mobile eye-tracking and emotional measurement can document what people are seeing, doing and feeling. These realities raise an important question tied to emotional measurement: Are the existing tools and paradigms (which have been designed and employed in an advertising context) appropriate to measure emotion in a packaging and shopping context?

Integrating emotional measurement

With this question in mind, we explored three primary paths for integrating emotional measurement within our studies. And while we aren't neuroscientists, we can offer an educated perspective on the viability and added-value of different techniques, based on our experience.

fMRI and EEG

Our initial efforts focused in this area, which promised the greatest scientific rigor and the most actionable insights. On over 25 studies, we gathered neuroscience measures (via a headband device), which were linked to PRS Eye-Tracking data to uncover the specific design elements (visuals, claims, etc.) driving emotional reactions. The studies were conducted among quantitative samples (of approximately 100 shoppers per cell) and this approach did provide very valuable findings in some cases:

- In a personal-care product study, an on-shelf shopping exercise showed that a proposed design system was not working – and emotional measures pointed to changes in cap color and on-pack messaging as the likely drivers.

- In a frozen food study, a proposed design system drove declines in imagery and purchase and we found that removing a familiar brand character from the packaging had a negative emotional impact.

However, we also encountered many executional challenges in working with neuroscience tools:

• Given the need for physical equipment (to measure brain activity), the approach was expensive, time-consuming and intrusive to shoppers.

• The data analysis was a "black box," which made it very difficult to dissect when the findings were complex or counterintuitive.

In addition, when the approach was used at the validation stage, the diagnostic insights gathered (regarding specific messages and design elements, etc.) had limited value and actionability, as teams needed to make final decisions immediately.

Facial coding

In parallel with our efforts in neuroscience, we've explored facial coding, which focuses on the analysis of involuntary facial movements that have well-established connections to core emotions. Specifically, we've partnered with leaders in that field on approximately 10 studies, in which we documented facial expressions (during interviews, focus groups and shopping trips) and linked this analysis to both behavioral and attitudinal measures gathered from the same shoppers.

Without question, we've found that facial coding has several clear benefits (relative to neuroscience), as it offers a much greater degree of transparency, flexibility and ease of execution. In fact, we've been able to incorporate facial coding as a value-added element of both qualitative and quantitative studies, including in-store studies and shopper studies at our PRS Retail Labs, which has driven incremental learning:

• In screening design concepts for a shelf-stable meal solution, facial coding suggested that the brand's current packaging was less compelling than indicated (via verbal reactions). It also uncovered negative emotional reactions to an "overabundant" food visual, which led to design refinements.

• For a frozen food product, facial coding uncovered the positive emotion driven by a specific visual element in the current design, which was then leveraged in the new packaging.

However, the facial coding analytical process remains time-consuming and costly (as it is reliant on an expert reviewing and classifying recordings) – and there is considerable debate regarding the accuracy and sensitivity of more automated and scalable quantitative approaches (i.e., Web-based tools). This is tied to the underlying issue cited earlier, as many packs (and Web-based shopping trips) simply don't drive very strong reactions that can be documented via changing facial expressions.

Visual images

More recently, we have piloted the use of visual images in our studies, which are explicitly labeled to illustrate core emotions (happiness, sadness, etc.) and which we've customized to include feelings more typically associated with shopping and packaging (confusion, satisfaction, etc.). Shoppers use these images to convey how packages (or displays) make them feel and then indicate the specific elements (visuals, messages etc.) that are driving these emotions.

Clearly, this approach is not neuroscience: It is does not provide physiological or biometric measures and it is self-reported, rather than non-conscious. And as with facial coding, it is not explicitly linked to eye-tracking and thus does not provide an exact linkage between what shoppers are viewing and feeling. However, this approach is broadly applicable and fully scalable, for both in-person and Web-based studies. And importantly, it adds an additional dimension to our analysis, as it encourages shoppers to think less rationally and respond (to stimuli) in a more emotive and visceral manner. It serves as a catalyst, to encourage them to share how products make them feel (and why).

For example, in a recent cookie study, shoppers consistently cited that a brand's packaging suggested a party, which evoked a positive emotional reaction. And, in a cereal study, alternative presentations of on-pack characters drove emotional reactions and created discrimination across brands.

Overall, we have uncovered insights and gained added value from several different approaches to emotional measurement. However, each approach also involves clear trade-offs across multiple dimensions (rigor/specificity, logistics, transparency, cost, timing, etc.). Thus, we've emerged less likely to think of finding a single solution to emotional measurement and more inclined to offer a portfolio of tools appropriate for different research objectives and cost/timing constraints.

Fundamental themes

In looking across our studies, we've always found it best to be cautious in generalizing across brands, categories and countries. However, we can share several fundamental themes that have emerged from our research into emotion:

- In a shopping context, the strongest emotion is often frustration, when shoppers are confused or can't find their desired product. Certainly, there have been cases in which shoppers have self-reported deeper emotions, such as the joy of finding a bargain. However, the underlying reality is that shopping for many products (particularly weekly staples found in grocery, drug and mass stores) is more task–oriented than experiential. And aisle after aisle, shoppers are navigating through an overwhelming array of options to find "their" product (or an acceptable alternative). In this cluttered environment, frustration can quickly set in, when products can't be found and time is wasted. And in fact, we've seen that many negative reactions appear to be linked to complexity. They are cases in which shoppers are being asked to work "too hard" to decipher packaging (due to small print or unclear messaging) or to understand product options. This finding is consistent with our historical experience, which suggests that less is more for in-store communication.

- Packaging (and particularly POS signage) can connect with shoppers on an emotional level, typically via the use of powerful visual images, design elements or promotional concepts. Despite the limitations cited above, we've found cases in which packages appear to speak to shoppers on

Research Company Spotlight - Eye Tracking

Below is a list of firms from our Researcher SourceBook™ specializing in eye tracking.

AnswerLab – San Francisco
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Clearworks
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http://www.crgglobalinc.com

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HCD Research, Inc.
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Illumination Research
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http://www.illumination-research.com

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The PreTesting Company, Inc. » SEE AD p. 41
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http://www.pretesting.com

Tobii Technology
703-738-1300
http://www.tobii.com

Usability Sciences Corporation
800-820-1222
http://www.usabilitysciences.com

an emotional level, by: provoking a laugh or a smile (via humor), such as with the Evian water packaging; linking to emotionally "richer" content, advertising or promotions, such as on-pack promotions common in the beer or soda categories; speaking to personal relevance (often via user imagery or personalization), such as with the Coca-Cola personalization campaign; and connecting with other senses (touch, smell, etc.), such as via contoured packs or special finishes, as in cosmetics and spirits.

As these examples suggest, the key is identifying ideas, visual images or design elements that resonate with shoppers and finding ways to incorporate them within packaging, signage or displays.

The path forward

Based on our experience to date, we can offer several guidelines for the path forward in incorporating emotional measurement within packaging and shopper studies:

First and foremost, researchers should use emotional measurement in conjunction with other packaging and shopper research tools, rather than as a replacement for them. Across our studies, the pattern has been clear: On-shelf behavioral measures tell us which systems are working and emotional measures (among others) help us uncover why.

Second, the focus should be on understanding reactions to messages and design elements and using this learning to optimize packaging and in-store activation. The primary added value of emotional measurement lies in its diagnostic value and its potential to help companies develop more engaging packaging and shopper marketing efforts.

Third, emotional insights are most valuable if they are gathered early in the design process, rather than at the end of the process, when there is less time or opportunity to make fundamental changes. Thus, marketers may be best served exploring ways to build emotional measurement into the exploration, development and screening process (more so than the validation process).

Finally, future efforts may be best focused upon the shopping and the product usage experiences (i.e., the first and second moments of truth), when packaging is most likely to drive intense emotional reactions. At our firm, we are using mobile eye-tracking in a range of contexts (in stores, in homes and at PRS Retail Labs) to better understand emotional triggers.

Window to a greater understanding

Emotional measurement can offer a window to a greater understanding of shoppers' motivations and, ultimately, a path to better packaging and shopper marketing. However, researchers should be aware of the inherent trade-offs across methodologies and give careful consideration to matching tools with research objectives. As importantly, they should keep in mind the unique dynamics of packaging and shopper marketing – and resist directly applying advertising-based tools and frameworks to these media. Marketers and researchers that take these factors into consideration are most likely to benefit from emotional measurement and to develop materials that engage shoppers, make a visceral connection and close the sale.

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••• neuromarketing research

How we're thinking about thinking

What's next for non-conscious measurement?

| By Elissa Moses

snapshot

After some early stumbles, non-conscious measurement approaches are establishing footholds in marketing research. Elissa Moses looks at three major shifts that got us to this point and looks ahead to 2015 and beyond.

The drive to understand human emotion is epic. As cavemen it was our earliest form of communication. And now as marketers, to learn to interpret, measure and influence emotion promises to be potentially the most influential driver of business success. As Marc Pritchard, global marketing and brand building officer of Procter and Gamble, has observed, "People's feelings and emotions guide behavior. We try to create an emotional connection with people." In that statement, Pritchard could be speaking not just for P&G but for the marketing and research industry as a whole.

The challenge for understanding and measuring consumer emotion is that it occurs mostly at the non-conscious level of brain processing and is too fast to be put into words. The language of emotion is felt and not easily verbalized. How then do we harness it as market researchers – especially when our best traditional survey approaches cannot expect to represent the realm of the unconscious?

It could be argued that the biggest breakthrough in market research this decade is in understanding non-conscious consumer response based on data and methodologies leveraged from neuroscience and behavioral economics.

This article addresses the three major research industry shifts that are shaping the way we collect data in 2015 in our continued quest to better measure non-conscious consumer response.

1. Shifts in perspective

The emergence and growing adoption of non-conscious methods across the market research industry has created a rapid evolution in perspective about these tools. At first, there was widespread skepticism, especially as some early practitioners made bold claims. However the unwavering need to understand human emotion led many researchers to persevere and experiment, leading to more mature perspectives about what non-conscious measurement tools can and can't do, how and when they are best

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used and also what to reasonably expect from them.

Conscious measurement is not going away. Contrary to unfounded early fears that non-conscious measurement would replace the common simple question, most concerns have been alleviated as people better understand how the mind makes decisions and why conscious perceptions will always remain critical. Essentially we know from Daniel Kahneman, David Eagleman and other academic field leaders that the decision process is wrought with conflict and lobbying by the conscious mind against our non-conscious emotional forces. To only understand non-conscious response is to only understand one side of the argument. If we are to advance our understanding of consumers, we need to understand how both sides of the brand or purchase decision debate unfolds. What are the conscious influencers and what are the non-conscious drivers? The only way to sensibly achieve a comprehensive understanding of consumer response and probability of resulting impact or intent is to design studies that layer non-conscious measurements with traditional research methods.

Not all non-conscious measurement tools do the same things. This is actually a serious understatement. Several methods address emotional engagement and types of emotions. Others focus on impact. Some are far more sensitive than others. Some are more expensive and less scalable. There is need for expertise and agnostic design when designing market research not only to fully understand study objectives, as always, but also to understand which non-conscious methods best to apply, why and how. Clients should be wary of one-size-fits-all method recommendations because the variations are pronounced and meaningful in weighing the practicality (scalable, representative and affordable) with the value (reliable, sensitive and actionable).

With growing sophistication regarding the strengths and weaknesses of various non-conscious measurement approaches there is now the necessary understanding that one type of method cannot do it all or be the same one needed every time.

Rapidly growing interest in behavioral economics. Research in behavioral economics focuses on understanding the decision process by taking into account emotional and other psychological factors. It is focused more on empirical outcomes measured by changing stimuli scenarios rather than the detailed understanding of specific non-conscious response. It is a very rich area to be explored and is a relatively young field with respect to market research applications. Since marketers need to understand and influence the drivers of behavior-based outcomes, we can expect to see increasing experimentation in this area, particularly using approaches that incorporate various forms of non-conscious data collection.

2. Shifts in emerging methods

There are a number of now relatively established non-conscious measurement methods that have proven themselves to be meaningful, reliable, consumer-friendly, scalable and affordable. These include facial coding, implicit, eye-tracking and to some extent, biometrics and EEG. However, with rapid innovations in technology and software, the market will expand this year with new testing options. Moreover there will be far more creativity for combining tools and methods to provide just the right types of insights for the objectives of each study.

New methods and uses are on the horizon. Most people have noticed that there is a mainstream revolution going on in wearable/mobile biometrics. This has infiltrated the mass market with devices such as Fitbit, Google Glass and the much anticipated Apple Watch. For the market research realm, this means that there are new options for mobile biometrics that capture heart rate and GSR, which enable ease of motion and new applications combining simultaneous measurements with mobile eye-tracking, Google Glass, etc. Customer experience and shopper journey research is about to change dramatically.

There are huge leaps occurring in accessibility and affordability of

Internet survey integrated tools for non-conscious measurement such as facial coding, implicit reaction time and eye-tracking.

Neuro tools are finally exploring the world of qualitative research on a larger scale, particularly with facial coding and eye-tracking etc. (However it should be remembered there is trade-off with respect to test/retest reliability and projectability, as with any qualitative vs. quantitative tool application.)

3. Shifts in practices

It was the original vision of recent neuro pioneers, who were among the first to apply neuro methods to market research studies, that non-conscious measurement tools would become mainstream. In less than 10 years, it is already happening with additional implications for changes in our industry.

Non-conscious methods become standard. At the large research companies, non-conscious measurement tools are being embedded into standard research studies for copy testing, brand tracking, product testing, concept evaluation, package and fragrance screens, media research, customer experience and shopper journeys. Among clients and research designers, the question isn't "Should we include non-conscious methods?" but "Which non-conscious methods are the best to include?" This is a major and relatively swift sea change to have everyday neuro for the market research industry.

In some respects, non-conscious measurement, which hinges on technological equipment and software, is being embraced along the curve of conventional technology adoption, where awareness and trial are escalating as availability and prices come down.

Non-conscious methods become universally available. Less than a decade ago, non-conscious measurement was exclusively the domain of the universities and neuro boutiques. However as the primary tools and methods of applied neuroscience innovation such as biometrics, EEG, facial coding and implicit became more readily accessible, large and mid-size market research firms began to conduct their own R&D, hire experts and also partner with boutique providers. This has encouraged the growth of non-conscious measurement by making the methods easily attainable through more distribution points and also globally scalable. Today the volume dynamic has shifted as more non-conscious measurement research is being conducted by the once traditional research agencies because of the sheer quantity and scale of their client needs. Hence the term "traditional research agency" is rapidly losing meaning as the large players aggressively innovate and conduct R&D in this area.

Broad learning from meta-analyses makes marketers smarter. We are approaching a tipping point in the number of data sets and studies with new methods now available to conduct meta-analyses and begin to harness the unique learning that can come from including non-conscious measures. This is where non-conscious data gathering gets really exciting. Now that we have increasingly large data sets against various techniques, we conduct meta-analyses that contribute not just to the learning of individual clients and projects but to the principles of good marketing and communications overall. For instance, we have conducted a number of meta-analyses on facial coding results for ad testing at Ipsos and observed some of the following as food for thought:

- Generally, the more emotion the better. Emotion means that viewers are engaged and interacting with the message. Lack of overall emotion may be a strong predictor of ad failure. Failure to have viewers engage in an ad emotionally diminishes its ability to get its message across at both the conscious and non-conscious level.
- Negative emotion can play a powerful role if appropriate to the story. It can cause dramatic tension and interest. It can also set the product up to be the hero. However, negative emotion is never warranted in response to product and branding moments.
- The last one-third of an ad is the most important for achieving success. This is usually because the end of an ad is where the product makes its benefit pronouncement and reinforces the brand. An ad can create intense emotional tumult but if it leaves viewers in a strong positive place, it has a high chance of succeeding.

Other meta-analyses for implicit and EEG yield similarly useful patterns and insights for improving overall marketing and communications.

Marketing and creative strategies will change to incorporate more specific emotional goals. With new understanding of how emotions drive consumer decisions, it is time for creative and strategic briefs to change to incorporate this understanding. Just as briefs since the *Mad Men* days have had specific goals about raising awareness and trial, strategies today need to take into consideration how the ad or other marketing materials will evoke emotions surrounding the experience to drive behavior. If emotional response is accepted as critical, we need to make it part of intended response strategy and not just a lucky (or not so lucky) byproduct of the rational promise and reason why. This is how marketing is going to begin to improve across the board.

Correlations will be further established between non-conscious measurement and market results. One highly desired outcome from the new array of non-conscious data is to be able to reduce predictive variance for consumer response modeling based on traditional survey data. Modeling of neuro data against in-market results will create new variables for non-conscious response in standard market response models. What's needed is for clients to share in-market data for new ground to be broken in non-conscious data predictive modeling. There are already many studies that suggest strong correlations between emotional response variables and in-market success. But this type of modeling is just beginning with non-conscious data. The more market data clients share the better and faster the industry will be able to provide important new capabilities.

New vantage points

Client market research departments and research companies will begin to increasingly recruit researchers with background in cognitive psychology, behavioral economics and neuroscience, the hot new majors. The next generation of researchers with these foundational academic backgrounds will be able to approach consumer response, decision-making and behavior from entirely new vantage points. Moreover they will be equipped with the scientific foundation and methods to build new approaches and advance consumer understanding in ways we have only dreamed of in decades past.

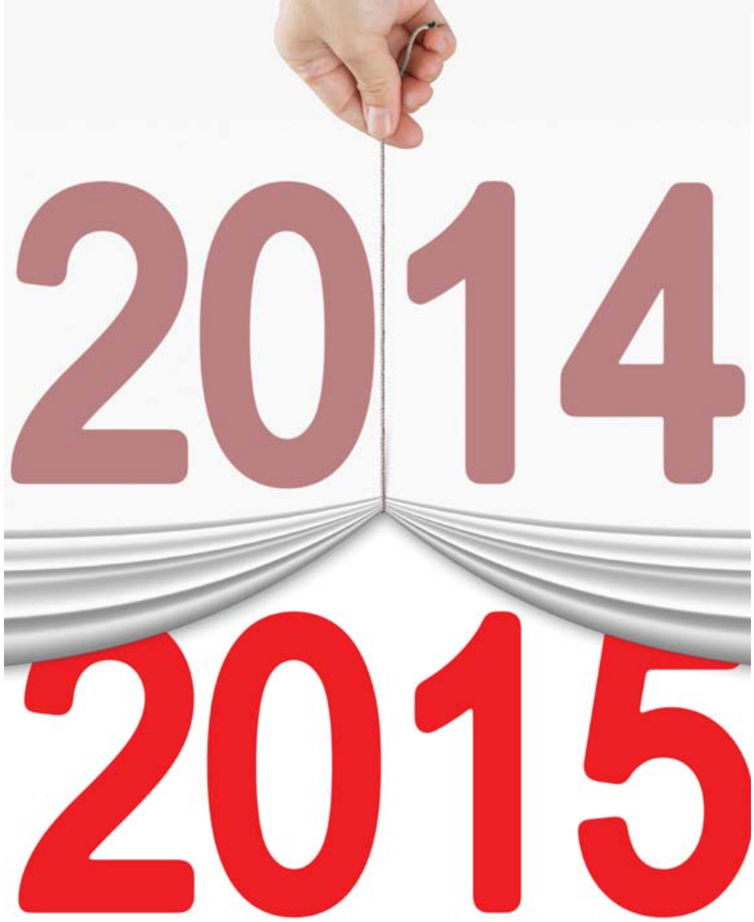
Based in Norwalk, Conn., Elissa Moses is executive vice president, Ipsos Neuro and Behavioral Science Center. She can be reached at elissa.moses@ipsos.com.

••• the business of research

The year that was, the year that will be

We are optimistic but our industry needs to keep evolving

| By Joseph Rydholm



snapshot

Researchers weigh in on how they're feeling right now, what they learned in 2014 and what they see coming in 2015.

As we close the book on 2014 and look ahead to 2015, what topics are top-of-mind for marketing researchers? In mid-November, we put out the call to researchers from around the globe, on the qual side and the quant side, to get their answers to the following questions. Many thanks to all who participated and sorry we didn't have room for all of your insightful comments here. On that note, we'll feature more responses in an article in a January edition of our e-newsletter, so watch your in-boxes.

Quirk's: What's your general feeling about the state of the marketing research and insights discipline for the coming year? Hopeful? Pessimistic? What makes you feel that way?

Diane Bowers, president, Council of American Survey Research Organizations: I'm optimistic about the opportunities we have for our industry, including research businesses and the profession. However, I still believe we are challenged by an uncertain economy that keeps us hesitant about exploring and investing in these opportunities.

Jeri Smith, president and CEO of Communicus Inc., Tucson, Ariz.: I'm very bullish about the state of the industry. Marketers, and those who reside within the C-suite, have a sense that the world is changing faster than they are able to keep up with and they have a hunger for insights to inform their decision-making. The market research and insights industry has the opportunity to take on an expanded role, consolidating multiple data sources and telling simple stories that produce the "aha" moments marketers and brand managers rely on. Researchers who can deliver on these promises will increasingly be invited to the table as companies plot their future courses. Researchers are also beginning to realize that forward-looking is of greater value than simply analyzing numbers from a rearview-mirror perspective. To the extent that our focus shifts in this direction, research will be providing

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far greater value to the C-suite.

Adam Rossow, partner, head of marketing, iModerate, Denver: I truly think it's what we make of it. If we are able to adapt and help organizations be more consumer-centric in a way that works with their current data sources then the sky is the limit. If we are rigid and pigeonhole ourselves into ad hoc project work then we are doomed to vendor status and easily replicable and replaceable. That said, I'm very optimistic about qualitative. The more data our clients lean on, big or otherwise, the more they are going to need context, meaning and reasoning.

Huw Hepworth, group account director, Painted Dog Research, Perth, Australia: On balance I'm optimistic but I'm also aware a lot of hard work is required to reap any rewards. It's the same as it always is: As an industry we'll have to continue to prove our relevance to clients in order to keep working for them while also keeping the burden on respondents/participants as low as we can so that they remain engaged. Budgets will be squeezed, as they always are; competition will be fierce, as it always is; and we have to keep innovating and improving in what we do.

Steve Raebel, president, fieldwork, Chicago: I am hopeful, I am always hopeful. Do I have reason to be? I'm not sure. As the economy continues to recover, I think corporate clients will have more and more confidence in the stability of the economy and will continue to invest in research for new and existing products and services. Even given this, I only expect moderate growth in the industry in the short term. This assumes we avoid another government shutdown or significant escalation of foreign hostilities.

What are some of the main factors shaping the direction of the MR and insights function these days and how do they impact the industry and its members?

Diane Bowers: I think we should re-commit to our inherent ability to investigate and innovate and be more entrepreneurial. That doesn't mean we abandon our rigor or our tested and proven methodologies. Rather, we need to adapt – or perhaps adopt – emerging technologies and techniques. We must continue to analyze and accommodate change while maintaining the integrity of our core inherent strengths.

Peter Harris, managing director, Vision Critical APAC: A number of factors are shaping the industry. Budgets are getting slimmer, more technology is available to help capture insight about customers, from business intelligence to social media analytics. Regardless, the opportunity is large for insight professionals. Firstly, customer insight has never been more important. Representative, accurate and holistic insight is in the hands of MR professionals, so while their budgets may be shrinking, they have never been more meaningful to other areas of business with increased budgets, like the CMO. Additionally, while there are many options to truly learn about customer behavior, only customer intelligence provides quick and robust insight into why consumers do the things they do. Social media only captures a small portion of a customer base and there is only so much CRM and BI technology a business can use before it actually has to ask its customers "Why?"

Steve Raebel: The price pressure has been making it more difficult [for research companies] to remain profitable and has begun to weed out the less-skilled researchers, both at the consulting level and the fielding level. This has created a buyer's market for research as [research companies] are more and more willing to accept lower prices. My hope is that this process is beginning to stabilize and supply is becoming more equal to the demand. The 2008 recession slowed corporate spending and the recovery has been slow. Unfortunately, I don't think our economy and the confidence in it is there yet but it's getting close. When it does turn around, I believe we then will be in the enviable situation of having a higher demand for research than the supply of researchers and prices – and profits – will begin to rise. I just don't see that happening [in 2015].

Marcus Jiménez, founder and CEO, StickyDocs, Denver: One influential factor I believe shaping the industry is the shift to absolute brevity in reporting. With corporate culture's incessant need for bite-sized learning, the ability to build deep, contextual understanding through story and narrative is being challenged, and in many cases, sacrificed. Insights should be easy to grasp, that is without question. However, story and narrative are proven to be the greatest forms in retaining concepts, but they mandate time and context. Yet too often this is unfortunately the first thing on the chopping block.

Adam Rossow: I think the [corporate] MR and insights function is so burdened in terms of individual projects that they barely have enough time to pick their head up, see how it all works together and look for the bigger picture. While they would like to be more consultative and prove their worth, it's challenging to do so when they don't have any room to explore and analyze outside the confines of specific objectives. This impacts us, the research firms, because clients aren't necessarily looking for a strategic partner as much as a vendor that can help them tick through items on their task lists quickly.

David McCallum, managing partner, Gordon & McCallum, and board director, Australian Market and Social Research Society: To be honest, the focus on driving down costs – and timelines – has been with us since Day 1. When was the last time you heard "The market has got less competitive" or that "Clients have become more relaxed about when they get their data and how much they spend"? The pressure comes from the growth in data sources and the learning time needed to master new approaches and methods, coupled, in part, with downsizing due to market consolidation from mergers. The net effect is that there are less "people hours" to exploit the possibilities, as few executives have the time to assimilate all available information to deliver actionable findings that essentially determine the ROI on research spend in the customers' (clients') eyes.

Patrick George, CEO, Askia, Paris: We hear everywhere that surveys should be shorter but our observation is that they are longer and longer. We have also noticed a much larger number of attempts to cheat through surveys to get rewards, which is worrying. There will be an industry need for proper responses – that does not mean better financial rewards for panelists [as some are already trying to be professional respondents] but rather finding panelists who really want to give valid responses.

Did you learn or discover anything in 2014 that surprised you or substantially altered your view of MR and its current and future status?

Mark Sumpter, president, Qualitative Research Consultants Association (QRCA): There's a prevailing myth that online research studies are far less expensive than in-person and with small to medium projects, that doesn't often hold true. Online may save travel expenses and time but the labor and skills required to design the study, collect the data and derive insights are the same whether the interview is face-to-face or conducted remotely. As came up at our recent QRCA conference, focus groups are not dead and never will be. Clients still yearn for the face-to-face.

Adam Rossow: I'm surprised that we – the research industry – haven't taken more of a leadership position on some of these huge trends – big data, mobile, social. It seems like we talk about them a lot but we are still waiting for the chips to fall before we truly innovate or put ourselves out there. It seems like we are dipping our toes in the water for an extremely long time. If we don't dive in, somebody else will.

David McCallum: I've been surprised by the sheer extent to which big tech companies are playing with data mining and various forms of passive measurement – Google Glass, etc. They aren't doing this for MR purposes per se but they could "accidentally" disenfranchise part of our industry, as MR is only playing lip-service to these trends.

Scott Layne, president, the Marketing Workshop, Norcross, Ga.: What we observe is that, while technology has created an opportunity for more robust and substantive analytics – with more powerful software, techniques and much more data – clients tend to be earlier in the adoption curve than we expected at this point. Two reasons for this jump out to us. First, with the economy still fighting its way back, clients are still somewhat cautious about spending more than they may have in the past for their research, despite the return that they may realize. Second, the DIY trend has slowed the adoption of more advanced techniques and approaches, as most DIY tools are not designed for much advanced data mining or predictive analytics, for example.

What would you like to learn more about or investigate in 2015? What's got you curious?

Diane Bowers: The use and value of social media in research. Big data and research, of course. How to adapt current research business models to accommodate Millennials – the future research leaders.

Mark Sumpter: How companies are structuring their marketing research – do they see marketing research as a collective goal or do they value segmenting that responsibility by department, by methodology, by channel, etc.?

Jackie Lorch, vice president, global knowledge management, SSI, Shelton, Conn.: I'm interested in doing more research on cultural effects, both because more and more of the annual projects we complete at SSI are global and because these effects impact the entire span of the research process, from how we recruit participants, how we select and quota sample, how we word questions, construct scales, interpret responses and assess the quality of those responses.

Across the globe, for instance, there has been industry concern about fraudulent responses from China. A closer understanding of cultural nuances could help us separate true fraud from poor-quality data caused by our ignorance in question wording, targeting or data interpretation. To take just one example, our SSI Chinese colleagues explain that in China addresses are constructed in a way opposite to much of the rest of the world: you start with a large geography then drill down to the final most specific data point. This makes a difference to how people perceive their home's physical location and thus how they might answer geolocation questions.

As we improve our questionnaires with gamification and participant-friendly design, differences in how we view the world through our local lenses could impact the data. More and more participants today are choosing mobile for their survey-taking and we are reaching people by mobile who may have never taken surveys before, creating even more urgency to get these details right.

Patrick George: I am excited about wearable technology and its impact on ethnography.

David McCallum: I'm interested in the interface between traditional surveys – the "what people are doing" – and passive measurement – the why/when – maybe from the further integration of mobile and neuro-biometric methods.

Scott Layne: Video is an area in which we have just begun to scratch the surface. Real-time video communication is poised to become one of the most transformative technologies since the Internet. It is clear that video communications is the closest technology to physically being present with those with whom you are communicating. Video has many potentially useful applications in our industry, from gathering, communicating and reporting information. Video is powerful and can be a key tool for how we capture and transfer knowledge.

What skills or qualities should researchers learn or enhance to stay fresh and relevant in the coming year?

Peter Harris: Traditional researchers should challenge themselves to think differently; 50+ page reports don't work; 100-question surveys don't work. What we did before doesn't work in today's modern, customer-driven world. We need to evolve from delivering statistics and data points to creating stories of real value that can be shared across the enterprise.

Jeri Smith: As the media landscape becomes more complex, the industry has focused on measuring exposure opportunities to help marketers sort through all of the buying choices. Combine this with the push to single-source data – in which exposure opportunities are paired with sales outcomes – and the actual human being who is the consumer is potentially lost in the sea of data. The consumer's perspective can blur and lack focus – what moves her, why does she seek out particular advertising and brand experiences?

Insights professionals, who are being asked to concentrate on deriving insights from big data sources, need to continue to represent the heart, soul and mind of the consumer.

This is also where tools can be of great value, for example, consumer-generated videos crafted into stories to illuminate the real, live consumer to senior management. But within this context, researchers carry a great responsibility to be accurate in their representations. Stories are very powerful and have the ability to mislead if they are not produced with great care and attention to the real consumer to whom they are giving a voice. This is just one of the areas in which art and science combine – the blend of which will be an even more important skill set for researchers in 2015 and beyond.

Mark Sumpter: Qualitative researchers specifically need to stay in front of the wave of change. Those who continue to offer clients the same old-school approaches to finding valuable insights will be left behind those willing to show success using new tools. The good news is that the fundamental rules and methods of data collection and interviewing remain the same. It is the tools that are changing. Having an updated toolbox is the best gift a quallie can give to clients this year.

Marcus Jimenez: I think something critical for researchers to consider exploring is their own creative sides in how can they bring their data and insights to life. What will become more and more critical in the future is not just an ability to find the right insights but also getting your teams to put those insights to work quickly and effectively. We ask our research clients to consider their data more as content than numbers on a spreadsheet. How can you as a researcher become more versed in the abundance of tools available that you can leverage to breathe life into your insights? It won't only be fun, it'll be absolutely necessary to make your insights stick as your team must now compete like any other for its share of attention from internal audiences.

Adam Rossow: I would say that researchers need to do better research – not in terms of the specific projects that we conduct but the type that necessitates looking at other data sources, embedding ourselves in companies, looking at what's going on in the world, etc. This type of research is necessary to be more holistic and properly portray findings in the larger picture. Simply put, researchers need to be more informed as to how what we capture fits in the mix.

David McCallum: Keep building on the basics. Looking for meaningful patterns in numbers doesn't change with technology. We're using less-scientific methods for sample selection so we need triangulation systems to check that our data source is generalizable if not projectable. Build the skills that will prevent clients from going 100 percent DIY. And [research] companies need to find ways to fund the trial of new methods rather than waiting for a client to fund a study out of interest.

Scott Layne: Research practitioners will always need to hone their skills in the areas of research design, synthesizing information and interpreting consumer attitudes and behaviors. The skills that will be necessary moving forward will address the ability to illustrate information so that it can be consumed instantly. Developing or acquiring skills that enable data to be visualized and accessible for dissemination instantly and directly will be key.

Names of Note

In Memoriam...

■ **Richard Chilton**, cinema research expert and company secretary for the *Alliance of International Market Research Institutes*, passed away on November 4 in London.

■ **Tony Twyman**, a pioneer in TV and radio measurement in the U.K., died on October 31 in Stratford on Avon, U.K.

■ **David Pattison** has joined London-based language analysis startup *Relative Insight* as an advisor.

■ Pittsburgh researcher *CivicScience* has hired **Kelly Benish** as vice president of publisher development.

■ Sydney, Australia-based custom research firm *the Leading Edge* has appointed **Katharine Milner** as director of qualitative insights and **Florencia Tarelli** as director of strategy.

■ Boston researcher *Communispace* has named **Franco Bonadio** as its chief creative officer.

■ **Chris Spence** has been promoted to director of sales and marketing at *Infotools*, an Auckland, New Zealand, research firm.

■ *RTi*, Stamford, Conn., has promoted **Mike Springer**, **Liz Antenucci** and **Candice Ni** to senior project director.

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2015/20150112

■ **Pat Molloy**, consulting chief information officer at *Salience Insight*, Dubai, has joined the international survey interchange standard Triple-S Group.


Liederbach

■ *Directions Research*, Cincinnati, has hired **Kacie Liederbach** and **Mike McCormick** as account managers.


McCormick

■ Research firm *the Marketing Workshop*, Norcross, Ga., has promoted **Randy Kosloski** to director of account management.

■ *Engagement Labs*, a Toronto technology firm, has hired **Chris Greenfield** to its strategic partnerships and client acquisitions division.

■ San Antonio researcher *Compass Intelligence* has promoted **Kate Pearce** to head of mobility and wireless research and consulting.

■ *Ipsos Middle East and North Africa* (MENA), a division of Paris research company Ipsos, has appointed **Hagop Harmandarian** as the new managing director of Ipsos Saudi Arabia (KSA).


Harmandarian

■ *The National Food Lab*, a Livermore, Calif., research firm, has promoted **Wilfredo Ocasio** to chief science officer of food safety and **Julie Hill** to senior vice president of lab services. Also, **Debbie Lohmeyer** was named senior vice president of consulting services.

■ *HfS Research*, Cambridge, Mass., has appointed **Barbra Sheridan McGann** as senior vice president, research in the U.S., and **Khalda De Souza** as principal analyst, services strategies in the U.K.

■ **Angela Holloway** has joined Boston researcher *Applied Marketing Science Inc.*, as manager of field operations, working in both the Insights for Innovation and Litigation Support practices.


Hunt

■ **Emily Hunt** has been appointed head of strategic insights and innovation at *Simpson Carpenter*, London. The firm has also hired **Katja Vukcevic** as account director and **Marios Nicolaou** as senior research executive.

■ **Doug Schorr** has re-joined the *Schorr Creative Solutions* research firm, Los Angeles, as chief insight officer.


Marsh

■ Nashville researcher *Consensus Point* has hired **Brad Marsh** as president and CEO.

■ San Francisco based *Clorox* has promoted **Nick Vlahos** to executive vice president and chief operating officer – household, lifestyle and core global functions and **Dawn Willoughby** to executive vice president and chief operating officer – cleaning and international.

■ New York marketing firm *JWT* has appointed **Lucie Greene** as worldwide director of JWTIntelligence.

■ *AccentHealth*, a New-York based patient education media company, has promoted **Erin Fitzgerald** to vice president, marketing.

■ **John Thomas** was promoted to managing director, healthcare, at *Burke, Inc.*, Cincinnati.


Clark

■ The Healthcare Division of *Morpace*, a research firm in Farmington Hills, Mich., has three new hires: **Patsy Clark**, vice president and **Debra Nicol Fin** and **Kathy Lester**, both vice president, business development. **Allison Bush** was promoted to vice president. Separately, **Erica Ruyle** has joined the firm as vice president on the qualitative team.


Nicol Fin


Bush

■ London research firm *Kantar Media* has appointed **Alex Kuhnel** as chief operating officer of its Target Group Index global consumer behavior and media consumption study.


Cardador

■ **Joe Cardador** has been named vice president, decision sciences, by *Gongos*, an Auburn Hills, Mich., research company.

■ Encino, Calif., research firm *uSamp* has promoted **Scott Stein** to vice president, research solutions, and hired **Alan Mavretish** as senior director, research solutions, and **Scott Jones** as senior director, retail solutions.

■ London researcher *Opinium* has hired **Andrew Littlewood** and **Adam Wilson** at its central London-based offices.

■ San Antonio researcher *Compass Intelligence* has promoted **Kate Pearce** to head of mobility and wireless research and consulting.

■ The Port Washington, N.Y., research firm *NPD Group* appointed **Matt Powell** as vice president, industry analysis for sports and leisure trends.

■ *Clear Seas Research* in Troy, Mich., has promoted **Brian Beaudette** to director of insight innovation, **Rebecca Merrell** to project manager, myCLEARopinion, and **Mitch Uyeda** to research manager.

■ Little Rock, Ark., researcher *Acxiom* has hired **Peter Davis** as group vice president, global consulting and analytics; **Chris Polishuk** as group vice president, West Coast and **David Bonalle** as head of digital impact.


Galgey

■ *TNS*, a London research firm, has promoted **Will Galgey** to CEO for TNS UK and **Michelle Harrison** to global head of political and social. Both are scheduled to begin their new responsibilities in January.


Harrison

■ **Scott Timmons** has joined *RTi Research*, Stamford, Conn.

■ **Steve Levine** has joined *Zeldis Research Associates*, Pennington, N.J., as vice president of client services.

■ New York technology firm *Digital Clarity Group* has hired **Connie Moore** as senior vice president of research.

■ **Allyson Kuper** has joined *Bug Insights*, a marketing research company in The Woodlands, Texas, as a consultant.

■ Mountain View, Calif., travel data firm *ADARA* has hired **Jie Cheng** as chief analytics officer.

■ *Decision Quest*, a Los Angeles legal services firm, has expanded its consultant staff in five offices with the following hires: in Chicago, **Daniel Wolfe**, **John D. Gilleland**, **Edward P. Schwartz**, **Joan Jackson**, **Gail Kalnajs**, **Scott Horwitz**, **Andrea Krebel**, **Amanda Hulsey** and **Jessica Porco**; in Miami, **Donna Browning**, **Marjorie Tinney**, **David Fried**, **Carlos I. Gonzales** and **Karl Reed**; in Washington, D.C., **Leslie Ellis**, **Samantha Schwartz** and **Lindsay Poutier**; In Los Angeles, **Laura Clementi** and **Chris Gibbs**, and in San Francisco, **Ronald Beaton**.

■ London research firm *Firefish* has appointed **Lyn McGregor** as qualitative managing director for its U.K. office and added her to its management board.


McGregor

■ **Jyoti Malladi** has been appointed executive director and head of *Ipsos ASI*, the advertising and communications research arm of Paris-based

Ipsos Group. She will be based in Ipsos' Mumbai office.

■ *Resonate*, a Reston, Va., research company, has appointed **Pat LaPointe** as executive vice president, a newly created position.

■ **Peter Scott**, chairman and CEO of *Engine*, a New York marketing firm, is leaving the company. It had recently been acquired by Lake Capital.

■ **Karen Lustig** has joined New York research company *Ipsos MarketQuest* in the U.S. as a senior vice president. She will be based in the Norwalk, Conn., office.

■ The Indonesia team of *Millward Brown* has been expanded with the hiring of **Anggra Tidayoh** as associate director of media and digital solutions; **Kelvin Gin** as group account director; **Richard McLeod** and **Aparajita Roy** as account director and **Emma Mussell** as associate account director. Also, **Chris Thomas** has joined as director of Millward Brown Vermeer and **Lara Burn** as group account director in the Firefly division.

■ **Nils Stangnes** has assumed the role of acting CEO of operations in Germany, Austria and Switzerland for Bridgeport, Conn., software firm *QuestBack* with the departure of former CEO **Hilarius Dressen**.

■ **Kim Dedeker** has joined research firm *Mizzouri* as principal and chief research officer. She will divide her time between the firm's Nashville headquarters and its Cincinnati office.

■ *HackerAgency*, a Seattle direct marketing agency, has named **Jay Levinger** as director of strategic planning and **Chris Bennett** as account director, acquisition and retention.

■ Denver-based restaurant chain *Smashburger* has named **Josh Kern** its first chief marketing officer. Kern was previously CMO at parent company Consumer Capital Partners.

■ **Pierre Le Manh**, CEO North America of *Ipsos*, has been appointed to the 2015 board of directors of *CASRO*. He took the Class 2 (larger-sized businesses) position for a three-year term beginning January 1.

■ **Roshni Nambiar** has joined *Peak Performance*, a Calabasas, Calif., CRM firm specializing in the automotive industry, as director of analytics.

■ *Olson Research Group Inc.*, Yardley, Pa., has appointed **Tim Oczkowski** as chief operating officer.

■ *Schibsted Media Group*, Oslo, Norway, has hired **Adam Kinney** as head of data science.

■ In London, *Double Helix Global Market Research* has accepted four trainees into its executive training program: **Adam Pierozynski**, **Jesse Monney**, **Rebecca Kingston** and **Zaynah Saleheen**. They will graduate from the program in 2015.

■ *The Market Research Society*, London, has appointed **Edwina Dunn**, co-founder of London marketing firm dunnhumby, as its newest patron.

■ **Hetta Bramley** has joined *ruby cha cha*, a research firm with offices in London and Darlington, Australia, as director of insight and planning.

■ Manchester, U.K., research firm *Mustard* has promoted **Gareth Hodgson** to a director and has hired **Laura Holloway** as senior research executive and **Amy Harrod** as research executive.

■ **Vicky Griffin** has joined Chicago research firm the *Blackstone Group* as a senior project/account manager.

■ **Jeff Hallock**, the CMO of wireless carrier *Sprint*, Kansas City, Mo., will leave the company by the end of the first quarter of 2015.

■ *ORC International* has hired **Jon Harding** as head of business development and **Patricia Hughes** and **Joe Mann** as vice president, client solutions.

■ *SIS International* has appointed **Chirag Vyas** as director of global operations and **Damir Gilyazov** as manager of market intelligence.

■ **Maureen Duffy**, formerly U.K. CEO for London market research firm *TNS*, has left the agency.

■ **Catherine Eddy** assumes the role of managing director of Australia and New Zealand for *GfK* in January.

■ In Anaheim, Calif., *Pacific Sunwear* has hired **Amber Fredman-Tarshis** as senior vice president and CMO.

■ *Greenberg Quinlan Rosner*, a Washington, D.C., research company, has promoted **Jessica Reis** to vice president.

■ Toronto marketing firm *Pearl Strategy and Innovation Design* has hired **Donya Germain** as senior director of insights.

■ **Andrea Schrager**, founder and CEO of *Meadowlands Consumer Center*, Secaucus, N.J., a research firm and focus group facility, was named a Leading Woman Entrepreneur by the *Leading Women Entrepreneurs*, a media and events company that recognizes outstanding women business owners.

■ **Jaideep Mehta**, managing director at *International Data Corporation – India and South Asia*, New Delhi, received the Leadership Award for Contribution to Market Research at the World Marketing Congress 2014 in Mumbai, India, in November.

■ **Nick Downes** has joined *BritainThinks*, a London research firm, as a senior research executive.

■ London researcher *Tonic Insight* has hired **Judy Taylor** in a non-executive consultancy role. At the firm's New York office, **Rosa Levitan**, **Matt Bock** and **Erica Bond** have been appointed account executives.

■ **Chirag Vyas** has joined the New York office of research firm *SIS International* as director of global operations and quantitative research, along with **Damir Gilyazov** as manager of market intelligence.

Research Industry News

News notes

■ In a global study, **BBC Worldwide**, London, will use facial tracking technology to test audience reaction to trailers or pilots of new television programming. The process utilizes installed Webcams and machine learning to interpret a viewer's emotions and, while similar to dial testing, does not require any active participation. The project is aimed at helping BBC Worldwide invest in guaranteed hits, such as *The Walking Dead* or *Breaking Bad*, according to Mary Kyriakidi, vice president at BBC Worldwide. Working with London marketing firm CrowdEmotion, BBC has already piloted emotion detection among focus groups in the U.K., Australia and Russia.

■ Seattle and London-based technology firm **autoGraph** has received a U.S. patent for its Consumer Self-Profiling GUI, Analysis and Rapid Information Presentation Tools and covers aspects of the company's profile technology along with the Swote (swipe + vote input) tool.

■ Less than a week after launching its Rooms app, which allows users to create groups for anonymous sharing, **Facebook**, San Francisco, was challenged by creators of a different app, Room, who claim that Facebook stole their intellectual property. Room is an iOS app, developed by **Room Inc.**, Paris. It is designed to let users "create and join mini private chat rooms of up to 500 people," using only a nickname and avatar to sign up. Facebook's Rooms app requires that members be Facebook members but they can join groups anonymously.

quirks.com/articles/2015/20150113

■ In Waltham, Mass., researcher **Affectiva** has reached the milestone of having collected emotion analytics from more than 2 million faces across 80 countries, resulting in over 7 billion emotion data points. This database is aimed at allowing researchers to more accurately understand consumers' emotional reactions to brands and video content while allowing for cultural variations.

Acquisitions/transactions

■ Tokyo-based researcher, **Cross Marketing Group** (CMG), has acquired Singapore researcher **Kadence International.** CMG planned no changes to the Kadence brand or management structure.

■ **Yahoo!**, San Francisco, has acquired **BrightRoll**, a San Francisco digital video advertising software firm. Its reporting suite includes tools from comScore, Nielsen, Vizu and InsightExpress. The deal was valued at around $640 million in cash.

■ Chicago researcher **Market Track** has acquired **Media Iris**, a Chicago online marketing intelligence firm. Michael Ciaglia, president and founder of Media Iris, has joined the Market Track staff.

■ **IHS**, a Denver analytics company, has agreed to acquire **JOC Group**, a Newark, N.J., maritime business intelligence firm.

■ Boston marketing firm **Semcasting** has acquired **the Marketing Grid**, Buffalo, N.Y., after partnering for several years with the Marketing Grid utilizing Semcasting's Smart Zones prediction modeling platform.

■ **Maritz Holdings Inc.** has acquired **Allegiance Software Inc.**, Salt Lake City, and merged it with Maritz Research Inc., Fenton, Mo., to form a stand-alone company, MaritzCX. The new firm combines Maritz Research's consulting and research work with Allegiance's software and program services and will have over 900 employees in 18 offices. Allegiance CEO Carine Clark has been named CEO of MaritzCX.

■ **Truven Health Analytics**, a Detroit technology firm, has acquired **Joan Wellman & Associates** (JWA Consulting), a Seattle management consulting company, and **Heartbeat Experts**, a New York software firm. Truven will be merging its software platforms, including MarketScan, Advantage Suite, Micromedex, CareDiscovery and ActionOI, with JWA's health care process improvement services.

■ Private equity firm **HGGC** has signed an agreement to invest in the parent company of **Survey Sampling International LLC**, Shelton, Conn. The investment, which makes HGGC the majority owner of the company, is done in partnership with Providence Equity Partners and Sterling Investment Partners, who have jointly owned the company since 2011 and are retaining minority stakes in the business. Terms of the transaction were not disclosed but a person briefed on the matter told *The New York Times* DealBook that the deal valued SSI at about $500 million.

■ New York researcher **Nielsen** has acquired Waltham, Mass., software specialist **Affinnova**, which helps companies identify ideas with the best potential for success. The Affinnova team will be integrated into the Nielsen Innovation Practice division.

■ New York digital marketing specialist **MediaMath** has acquired **Rare**

Crowds, a software firm specializing in audience targeting in Bellevue, Wash., for an undisclosed sum. Eric Picard, Rare Crowds founder and CEO, will join MediaMath as vice president of strategic partnerships.

■ **Merkle**, a Columbia, Md., CRM firm, has acquired San Francisco-based loyalty program firm **500friends** for an undisclosed sum.

■ St. Petersburg, Fla., marketing firm **Catalina** has acquired San Jose, Calif., marketing firm **Cellfire**, which specializes in digital grocery coupon solutions. The purchase is geared toward enabling Catalina to develop personalized offers for shoppers. Terms were not disclosed.

■ **MWW**, a New Jersey public relations firm, has acquired **Ideation Inc.**, a New York-based technology firm. Ideation founder Robert Dilio will join MWW as chief technology officer.

■ Chicago researcher **fieldwork Inc.**, has extended its commitment at 111 East Wacker Drive, Chicago, which houses the company's national headquarters and downtown Chicago focus group space.

■ **Survey Monkey**, San Francisco, is investing $5 million into the **Marcus Buckingham Company** (TMBC), a Los Angeles leadership development firm. The two companies plan to develop new tools to help monitor employee performance and productivity and provide supervisory coaching techniques. Jason Averbook has been named CEO at TMBC and Damon Cronkey, senior vice president of corporate development and strategy at SurveyMonkey, will join the TMBC board.

■ Paris marketing firm **Publicis Groupe** will acquire Boston-based information technology firm **Sapient** in a $3.7 billion transaction. Sapient includes three divisions, Global Markets, Government Services and Sapient Nitro.

■ Paris marketing firm **Publicis Groupe** has acquired **RUN**, a New York advertising technology firm, for an undisclosed sum.

■ In Englewood, Colo., information services company **IHS** will acquire **DisplaySearch** and **Solarbuzz**, research firms in Santa Clara, Calif. The two companies are subsidiaries of Port Washington, N.Y., researcher the NPD Group. Terms were not disclosed.

Alliances/strategic partnerships

■ After two years of partnering, Stockholm, Sweden, research company **Cint** and **Survey Monkey**, Palo Alto, Calif., agreed to expand their strategic relationship. The Cint platform for global sourcing and supply chain management will now serve as the preferred technology for Survey Monkey in the markets where Survey Monkey does not have its own supply. The deal is designed to benefit both companies, with Cint seeing growth of its global supply platform and SurveyMonkey increasing its reach and improving customer service.

■ Los Angeles online panel company **Prodege** will work with Seattle researcher **TrueSample** to provide verifications of its survey response pool.

■ London-based online research specialist **DigitalMR** is partnering with **MRB Hellas**, a research firm in Athens, Greece, to expand its listening247 platform and communities247 multilingual service to companies in Greece.

■ **Market Publishers Ltd.**, London, and **Market Analyix**, London, have signed a partnership agreement allowing Market Publishers to distribute and sell the Market Analyix research reports.

■ **Social@Ogilvy**, the social media department of Ogilvy & Mather, New York, is partnering with **Unmetric**, a New York-based social media intelligence firm to use its social media intelligence and benchmarking platform which tracks the online behavior of 25,000 brands across all major social media channels.

■ **D. Gustafson and Associates** (DGA), a research firm in Dresher, Pa., is joining with **JONCKERS**, a Brussels translation and localization firm. The partnership is designed to ensure DGA data collection methodologies are equivalent across market segments and locations and that its translations are accurate and allow for cultural and linguistic nuances.

■ New York publisher **Billboard** and New York researcher **Nielsen** have agreed to a multi-year extension of their current agreement and will expand the agreement to include joint development of new initiatives to better measure and analyze market trends in the music industry.

■ **Macromill**, a research firm in Tokyo, and **MetrixLab**, a research company headquartered in Rotterdam, the Netherlands, are merging and will operate under the Macromill brand. The new firm will be led by Han de Groot, global CEO, and Katsumi Konishi, Japan/Asia CEO. Jan Willem Gerritsen, former COO/CFO at MetrixLab, will become executive officer managing the U.S., European and Latin American businesses. Naoya Sugiyama of Macromill will be responsible for staff and general administration and Naofumi Nishi of Macromill will oversee corporate development. Financial terms of the merger were not disclosed.

■ Atlanta researcher **Decooda** has partnered with Austin, Texas-based **Bazaarvoice** to expand Decooda's MC3 cognitive-linguistic text analytics engine. The updated version is designed to incorporate Bazaarvoice ratings and reviews, allowing clients to monitor consumer reviews along with social media and business data. The integrated model also aims to analyze how consumers relate to a brand; how a brand is delivering compared with expectations and how consumer experiences link to sales.

■ New York travel industry researcher **PhoCusWright** has partnered with **Mapie**, a Brazil-based research company that specializes in the Latin American market. The agreement includes Mapie assistance with fielding surveys, assisting clients and distributing PhoCusWright travel, tourism and hospitality research in Latin America.

■ **Twitter** and **IBM** are partnering to integrate Twitter data with IBM ExperienceOne customer engagement tools, designed to allow sales, marketing and customer service departments to track customer sentiment and behavior. IBM Global Business Services professionals will have access to Twitter data to enhance their consulting services.

■ **Specific Media**, an Irvine, Calif., Internet firm, has expanded its partnership with New York researcher **Nielsen** and will combine Nielsen's brand media FMCG dataset with Specific Media's behavioral data to launch Shopper Access, a shopper-based targeting solution.

■ **Qualia Media**, a New York marketing company, and **Placed Attribution**, a Seattle Internet firm, have signed an agreement allowing Qualia to access the Placed location technology, designed to determine the location of 250,000 opted-in panelists.

■ **Research Runner**, a Sawbridgeworth, U.K., research firm, has partnered with London marketing firm **Magnificent Stuff** in a move designed to provide clients with a range of digital and print marketing services.

Awards/rankings

■ **Roni DasGupta**, head of market research sales at **M3 Global Research**, Washington, D.C., and co-worker **Bill Friedrich**, director of research services, received the 2014 Pharmaceutical Market Research Group Circle of Excellence Award.

■ **IMRB International**, Mumbai, India, was named MR Agency of 2014 at the 24th annual market research seminar of the Market Research Society of India in Mumbai in November.

■ In Baldwinsville, N.Y., **RMS Healthcare**, a division of Research and Marketing Strategies, was ranked fourteenth in size among U.S. patient-satisfaction survey firms by *Modern Healthcare* magazine. Rankings were based on the total number of clients and engagements in 2013.

New accounts/projects

■ **Koski Research**, San Francisco, has been selected as the market research content provider for IRIS, a Web site for financial services entrepreneurs which includes topics such as sales, personnel, technology and lifestyle. Koski will also design and administer the IRIS research poll of timely and relevant topics.

■ London researcher **Mintel** has opted to bring its survey programming in-house for the first time, licensing the Beacon market research and reporting platform of **Decrypt**, a London market research firm.

■ **The BBC**, London, has selected the **Digital Analytix** software of Reston, Va., research company comScore to provide analytics for all of its digital content, including Web, mobile and video content for all domestic and global services.

■ The phone, dialer and Web survey data collection platforms of Montreal-based software firm **Voxco** have been chosen by by **IMPAQ International**, a Baltimore research company, for its Survey Research Division.

■ In London, the **Broadcaster's Audience Research Board** has combined its contract for its establishment survey and the contract for recruiting panel eligible homes into one contract, effective with the Q1 2015 bidding for the January 2016 contract.

■ Portland, Ore., researcher **Rentrak** and **Weigel Broadcasting**, Chicago, have expanded their contract to provide local market TV ratings for three additional stations in Chicago and four in Milwaukee.

■ London financial services firm **Old Mutual** will utilize New York research company **Millward Brown** for its international brand tracking program, aimed at measuring the performance of its brands in key global markets.

New companies/new divisions/relocations/expansions

■ **Q Research Software**, Sydney, has opened a London office, which will be led by Nigel Cartman.

■ London marketing firm **Creston** has been rebranded as Creston Unlimited, with its research companies now being named ICM Unlimited and Marketing Sciences Unlimited.

■ Toronto researcher **Advantage International** has opened a New York City office which will be headed by Sal Fiordelisi.

■ In Austin, Texas, Matt Sanchez has launched **Cognitive Scale**, a technology company. Its Insights Fabric platform is designed to analyze large amounts of structured and unstructured data to generate insights from "dark data," defined as information not readily machine readable or easily accessible, such as blogs, e-mails, social media and images.

■ Singapore-based researcher **Kadence International** has opened a Middle East office in Dubai, which will be led by Amit Garde and Rakesh Dayal. The firm also plans to open an office in Riyadh, Saudi Arabia.

■ Birmingham, U.K., researcher **VoxPopMe** has expanded to the U.S. with the opening of an office in Denver. It will be staffed by Dean Macko as managing director, North America. VoxPopMe offers a platform designed to capture video as consumers provide feedback on brands. The software is also aims to provide sentiment analysis to determine the attitude of the consumer.

■ **72Point**, London, the parent company of research firm OnePoll, has expanded to the U.S. market with the launch of an office in New York. It will be led by U.S. CEO Tim Haslam.

Research company earnings/ financial news

■ Reston, Va., research company **comScore**'s Q3 2014 revenues were up 15 percent to $82.1 million. It also posted a GAAP net loss of $3.3 million due to a $6.9 million impairment charge related to its mobile operator analytics division, which will be divested or shut down. Year-to-date revenues were $239 million, up 14 percent from the same period in 2013.

■ **Forrester Research**, Cambridge, Mass., announced total Q3 2014 revenues of $75.4 million, with research revenues increasing 2 percent and advisory and event revenues increasing 24 percent, compared with Q3 2013.

■ **Cardlytics**, an Atlanta advertising and technology firm, has launched a $70 million funding round.

■ **Gigya**, a Mountain View, Calif., software firm, raised $35 million in a Series F round. Gigya software is designed to help businesses utilize customer log-ins to identify users, aggregate data and personalize campaigns.

■ Stamford, Conn., research firm **Information Services Group** announced third-quarter revenue up 3 percent in constant currency terms, to $53.3 million. Revenues in Europe rose 10 percent to $19.7 million while they were flat in the Americas and fell five percent in the Asia-Pacific region.

■ Portland, Ore., research company **Rentrak Corporation** announced its fiscal second quarter results, with total revenue up 41 percent to $25.2 million. The firm's TV Everywhere business grew 85 percent to $13.3 million and its Movies Everywhere service grew 16 percent to $7.4 million, while its OnDemand Everywhere and other services were flat.

■ **Gartner**, a technology research firm in Stamford, Conn., reported a 15 percent increase in third-quarter revenue to $470.9 million, with the revenue from its Research division also increasing 15 percent to $365.3 million.

■ Cambridge, Mass., software firm **InsightSquared** secured a $13.5 million Series C funding round.

CALENDAR OF EVENTS

••• can't-miss activities

The Neuromarketing Science and Business Administration (NMSBA) will hold a conference titled, "Neuromarketing Theory and Practice" on January 26-27 in San Francisco, on January 29-30 in Mexico City and on February 2-3 in Bogota, Columbia.

Unicom will hold a conference, themed "Real-Time Analytics: Making better, faster business decisions" on January 29 in London. Visit http://conferences.unicom.co.uk/real-time-analytics/.

The Merlien Institute will hold a conference, themed "Qualitative 360 Europe," on **February 3-5** at the Novotel Brussels Centre, **Tour Noire, Brussels.** Visit http://qual360.com.

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 Council of American Survey Research Organizations will hold its digital research conference on February 11-12 in Nashville. Visit http://www.casro.org/?15drp.

Worldwide Business Research will hold its 2015 mobile shopping conference on **February 11-12** at the American Square Conference Centre, **London**. Visit http://wbresear.ch/qud.

The International Institute of Knowledge Measurement will hold its annual conference, themed "Redefining the Art and Science of Marketing" on February 17-18 in Colombo, Sri Lanka. Visit http://marketingconferences.co/2015/.

Worldwide Business Research will hold its flagship conference, "eTail West" on **February 17-20** at the JW Marriott Palm Desert Resort and Spa in **Palm Desert, Calif**. Visit http://www.etailwest.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.

IIR will present the Apex: All Payments Expo on **February 23-25** in **Las Vegas**. Visit http://www.iirusa.com/allpaymentsexpo/home.xml.

The IIR ePharma Summit will be held on **February 24-26** at the Hilton **New York.** Visit http://www.iirusa.com/epharmasummit/overview.xml.

The American Marketing Association will hold a conference, themed "Analytics with a Purpose: Insights, Inspiration and Action," on **March 1-3** at the U.S. Grant in **San Diego**. Visit www.ama.org/analyticswithpurpose.

The Merlien Institute will hold a conference, themed "Market Research in the Mobile Workd – Asia-Pacific" on March 10-12 in Singapore. Visit http://www.mrmw.net.

IIR will hold its FEI EMEA conference, themed "Fueling Forward the Innovation Engine," on **March 11-13** at the Renaissance Vienna Hotel in **Austria**. Visit http://www.iirusa.com/feieurope/home.xml.

The Merlien Institute will hold a conference, themed "Market Research in the Mobile World – Asia-Pacific" on March 10-12 in Singapore. Visit http://www.mrmw.net.

The Advertising Research Foundation will hold a conference, Re:Think 2015, themed "Reimagine Research" on March 16-18 in New York. Visit https://www.etouches.com/ehome/89073

The Market Research Society will hold its annual conference, themed "Impact 2015 – Understanding Customer Behavior in a World of Change" on March 17-18 in London. Visit www.mrs.org.uk/conference.

Worldwide Business Research will hold a conference, themed "Next Generation Customer Experience," on March 23-25 at the Omni San Diego Hotel, San Diego. Visit http://www.the-customer.com.

Strategy Institute will hold a conference, titled "Customer Experience Strategies Summit," on **March 25-26** in **Toronto**. Visit http://www.customerexperiencecanada.com.

The Sawtooth Software Conference 2015 will be held on **March 25-27** at the Loews Portofino Bay Hotel in Universal Orlando, **Orlando Fla**. Visit http://bit.ly/1vT1dIb.

The Neuromarketing Science and Business Administration will hold a conference, titled "Neuromarketing World Forum – Understanding Creativity," on March 25-27 in Barcelona. Visit http://www.neuromarketingworldforum.com/.

Worldwide Business Research will hold a conference, titled "Digital Travel Summit" on April 27-29 in Las Vegas. Visit http://www.digitaltravelsummit.com.

Worldwide Business Research will hold a conference, NETFINANCE 2015, focused on digital marketing for financial services on April 27-29 in Miami. Visit http://www.netfinanceus.com.

The 2015 Canadian Pharma Market Research Conference will be held on April 28-29 at the Sheraton Toronto Airport Hotel and Conference Centre, Toronto. Visit http://pharmamarketresearchconference.com.

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

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BEFORE YOU GO ••• issue highlights and parting words

••• cover-to-cover

Facts, figures and insights from this month's issue

page 19 Twenty-three percent of Americans who recently shopped for health insurance say that it was less enjoyable than facing a dentist's drill.

page 30 Again, the game-enhanced version took longer and was still rated as more enjoyable.

page 42 Are the existing tools and paradigms appropriate to measure emotion in a packaging and shopping context?

page 48 Not all non-conscious measurement tools do the same thing. This is actually a serious understatement.

page 54 There is only so much CRM and BI technology a business can use before it actually has to ask its customers "Why?"

page 55 We hear everywhere that surveys should be shorter but our observation is that they are longer and longer.

A quantitative look at Quirk's in 2014

902,683........ Total Web site visits in 2014
11.1 .... Percent increase in article traffic over 2013
3,015,122 ...... Web site page views in 2014
68.8............ Percent of visitors classified as "New Visitors"
8,276 .... Total pages on Quirks.com
6,857........... New accounts created in 2014
55,116.......... Market researchers in Quirk's database
63.2............ Percent of subscribers receiving the magazine digitally or via mobile app
6,781 .... Mobile apps downloaded
45.3............ Percent increase in app downloads over 2012
40,354 .... Number of members of Quirk's LinkedIn Group
18.4 .... Percent increase over 2013 Quirk's LinkedIn Group members
412 .... Articles published in 2014
1,410........... Number of magazine pages produced
72............... Events participated in during 2014
0................ Average dollar price increase for advertising

Coming in the February Quirk's

••• mobile research

Netflix researchers report on a comparison of e-mail and smartphone push-notification methods for capturing in-the-moment responses on video entertainment source choices.

••• mobile research

Making the most of limited screen real estate and other ways to excel at mobile surveying.

••• millennials

Communispace's Katrina Lerman examines findings from a study on how Millennials view the health care process.

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