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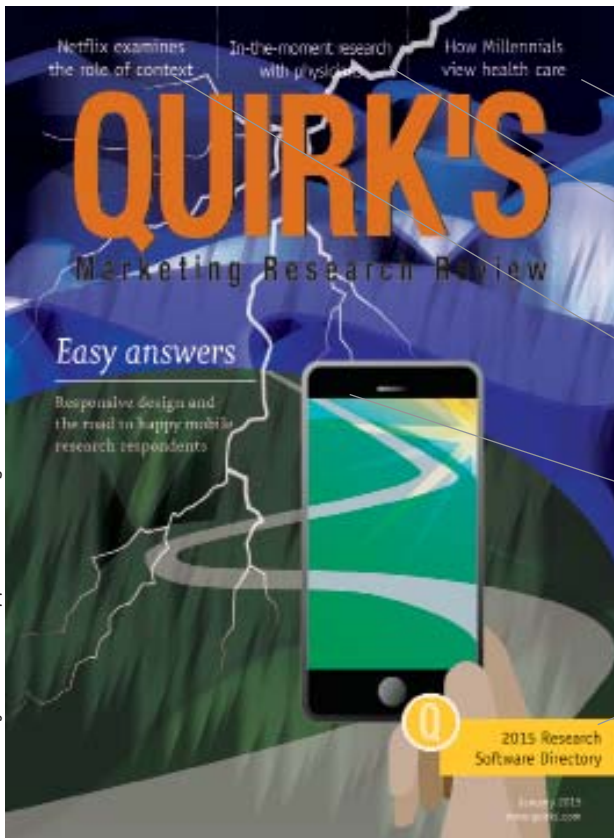
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... events

MR events are all a-Twitter

Since joining the Twitter ranks, we have worked to use our Twitter presence to connect with our audience, share our latest articles and blog posts and give live updates from the numerous events we attend throughout the year. This year at the inaugural Quirk's Event on February 23 and 24 in Brooklyn, N.Y., join in on the discussion using #QuirksEvent. We hope to hear your thoughts and ideas throughout the event! Follow us on Twitter at @QuirksMR for tidbits before, during and after the gathering.

Speaking of events, you've probably checked out the Calendar of Events (p. 78) found in each issue of Quirk's that lists all the marketing research-related happenings in the next few months but did you know we also have an online database that includes:



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●●● online research

Social media, we wish we knew how to quit you

In a survey conducted in December 2014 by Ringwood, N.J., research firm Leflein Associates Inc., 92 percent of adults polled admitted to at least one digital addiction. For most people, their e-drug of choice is social media: more than one-third of adults surveyed (34 percent) confessed that they simply couldn't control themselves when it came to their online social life.

Compared to social media, other online addictions are meager at best. Online gaming comes in at 15 percent and online shopping trails with a mere 14 percent. Of note, among those addicted to online shopping, the plurality resided on the West Coast (33 percent), nearly twice as many as from the Northeast (16 percent).

The impact of digital addiction covers a wide range of demographics. Women are nearly twice as likely to have a fixation on social networking than men, at a rate of 45 percent to 24 percent. Men are also more likely to have a problem with streaming services than women, particularly online video (13 percent versus a mere 5 percent for women). Additionally, men are more inclined to obsessively stream music than women, at a rate of 18 percent to 11 percent. Surprisingly, there's an equal amount of addictive behavior from the genders when it comes to online shopping: 14 percent of both men and women just can't resist those online shopping carts.

Age also appears to be a factor when it comes to digital addiction. Young Millennials ranging from 18-24 reported equally high levels of addiction to online gaming and social media (each at 28 percent). Conversely, only 8 percent of the 18-24 group considered online shopping to be a serious addiction. Addiction to online shopping also trails off among the oldest adults (55+), with a mere 10 percent reporting an online shopping addiction.



●●● reputation research

U.S. takes honors as top 'nation brand'

A report from brand consultancy Brand Finance on the world's 100 leading "nation brands" shows that the U.S. is the world's most valuable nation brand, with a \$19.3 trillion brand value. Germany is the strongest nation brand, with a score of 75.84 out of 100. Qatar is the fastest-growing nation brand; its brand value is up 39 percent to \$256 billion.

Ukraine is the fastest faller; its brand value is down 37 percent to \$80 billion. The impact of conflict has been felt in Russia too; its brand value is down \$90 billion. The Scottish referendum threatened "Brand Britain" but a "no" vote saw the U.K.'s nation brand value surge 20 percent to \$2.8 trillion.

Brand USA's \$19.3 trillion brand value is more than three times that of second-place China, whose brand value comes in at \$6.4 trillion. Though the actions of the U.S. on the international stage are frequently in question and polarization and deadlock beset domestic politics, decades as the preeminent force in finance, entertainment, democracy and technology means the U.S. should continue to top the ranking for years to come.





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New book brings MR's rich history to life

The stereotype of marketing research, or any discipline that involves the compiling and analysis of numbers, is that it's dry as dust, requiring little in the way of creativity or personality. While there are always examples to bolster the conventional view, all you have to do is attend a research industry conference or read an issue of *Quirk's* to find displays of both traits, along with ample helpings of ingenuity and curiosity.

You'll also find them if you pick up a copy of the new book, *A Nation of Numbers – The Development of Marketing Research in America*, by long-time researcher Paul Scipione.

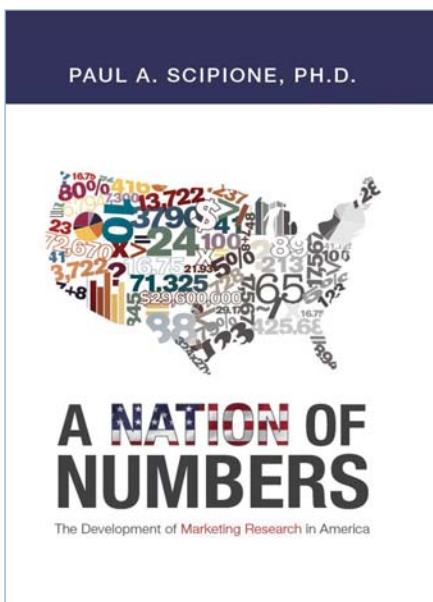
I spent much of this past summer editing the book (it's published under the Quirk's Marketing Research Media banner) and among my many takeaways, I was struck by the multiple examples of gumption, ambition and outside-the-box thinking (before there was even a box to think outside of!) Scipione has captured in the book's 500+ pages.

Now of course, since the book is about the birth and growth of the marketing research industry, naturally the early researchers were trailblazers who had to make up the rules as they went along, paving the way for how things are done today. In other words, creativity was a necessity.

As Scipione so entertainingly chronicles, a host of factors, from our rapid population growth to the accompanying explosion of our democracy's commercial and industrial output, coalesced to create an unending and ever-growing list of things that needed

to be measured: babies born, products sold, ad spots placed, TV shows watched, elections won and lost.

And thus were needed people to figure out how to measure them all – the metrics to use, the machines to build to do so – and, once measured, to make sense of the resulting sea of numbers. Charles Coolidge Parlin, Daniel Starch, John B. Watson, George Gallup, Ernest Dichter, Elmo Roper, Alfred Politz, Paul Lazarsfeld, Arthur C. Nielsen, Herman Hollerith – the book brings them all to life.



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Joe Rydholm can be reached at joe@quirks.com

Scipione's enthusiasm for his subjects and subject matter is infectious and he tells their stories with a well-informed, conversational style. He effectively grounds events in context and tries to give all sides to a story, especially in sections such as those dealing with the supposed feud between Ernest Dichter and Alfred Politz. While acknowledging their various individual achievements and their importance, he gives them humanity by including their foibles and failings along with their accomplishments.

These days, the marketing research and insights function stands at a bit of a crossroads. There are questions about MR's role and relevance. In order to forge a viable future, we'll have to blaze some new trails but, as *A Nation of Numbers* shows, we've done it before and, if history is any guide, we can do it again. **Q**

In conjunction with *The Quirk's Event* this month, Paul Scipione will be speaking about *A Nation of Numbers* and telling some stories from it along with signing copies of the book afterwards. If you're in Brooklyn, stop by. Head over here for more info on the conference: www.thequirksevent.com.



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Speaker sales making some noise

Music throughout the house

Streaming speakers are leading a broad resurgence in the audio market. Along with stereo headphones (up 28 percent in dollar sales since 2011) and soundbars (sales have nearly doubled in two years), sales of wireless speakers surpassed \$1.3 billion in the 12 months ending in October 2014 (from just \$150 million in 2011), according to the NPD Group's Retail Tracking Service.

But, as reported by NPD's Ben Arnold, while the speaker market has grown over the past three years, it's also become increasingly diverse – the

number of brands making speakers has doubled since 2012 and trends in consumer usage of the devices have helped carve out new segments in the market like expandable and ruggedized speakers.

According to the NPD Group's Wireless Speaker Study, wireless speaker owners are using their devices in multiple listening environments during a diverse range of activities. Owners of portable wireless speakers, which tend to be battery-powered and Bluetooth-enabled, say 22 percent of their listening is done outside the home while 78 percent of usage occurs inside the home. Most consumers (62 percent) say they listen while lounging around the house. However, use during other

activities like cooking/cleaning (49 percent), exercise (36 percent) and video game playing (17 percent) also ranked highly – an indication of the versatility of the devices.

As a result, manufacturers are rolling out new features to complement the speakers' diverse use case. Sales of expandable speakers (multiple-speaker devices that can be paired together to play the same music), for instance, doubled in 2013 while a number of companies, including Skullcandy and Fugoo, introduced ruggedized speakers for active outdoor use this year.

Inside the home, fixed-location speakers are beginning to redefine the traditional home stereo system. Unlike portable Bluetooth speakers that typically tether a single-source device, like a smartphone or tablet to a speaker, Wi-Fi-connected fixed-location speakers can pull content from a variety of connected devices in the home. According to the study, 36 percent of fixed-location speaker owners stream content to the device from their smartphone, however a similar number (33 percent) listen to music saved to a notebook or desktop PCs – where many consumers still store their digital music collections.

As gigabytes of MP3 files continue to replace shelves of CDs in many listeners' music libraries, fixed-location speakers like Sonos and Bose's Soundtouch provide an easy, wireless way to pull content from a user's entire digital music collection (provided it is connected), not just what's streamable from a mobile device or music service. The rise of this new crop of wireless home speaker devices comes at a time when traditional home audio products like shelf systems (6 percent dollar decline in the 12 months ending in October 2014), "home theater in a box" systems (39 percent decline) and docking speakers



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(53 percent) are falling. Many wireless speaker owners are also showing signs they are retiring their existing audio products. More than half (53 percent) say their speaker device has replaced an existing product in the home (a wired speaker, docking speaker or shelf system).

Will the growth of the wireless speaker market lead a wireless revolution elsewhere in audio? There are already signs that it will. Sales of Bluetooth-enabled headphones and soundbars each doubled in 2014 and connected audio/video receivers now account for 39 percent of all unit sales. Additionally, many wireless speaker owners show interest in adding to their system – 43 percent of current owners expect to buy another wireless speaker in the next 12 months. Given the rate of growth in wireless as a feature in speakers, soundbars and headphones, the signs point to wireless being not just a fad but the next really big thing in audio.

www.npd.com



●●● health care research
**Gallup looks back
 at health care 2014**

How were we feeling?

Gallup's Alyssa Brown compiled the top 10 most important findings from the near-90 articles Gallup issued in 2014 about Americans' health and well-being drawn from the Gallup-Healthways Well-Being Index, which

surveys Americans daily to uncover insights on their sense of purpose, social relationships, financial security, connection to community and physical health. Following are Gallup editors' picks for the top 10 most important findings in 2014:

Uninsured rate drops nearly four percentage points since late 2013. Gallup was among the first to report the decline in the U.S. uninsured rate, which coincided with the new requirement that Americans carry health insurance. The percentage of U.S. adults without health insurance was 13.4 percent in both the second and third quarters of 2014, down from 17.1 percent in the fourth quarter of 2013. This is the lowest quarterly uninsured rate measured since Gallup and Healthways began tracking it in 2008.

Uninsured rate drops more in states embracing ACA. The uninsured rate among adults in the states that have chosen to expand Medicaid and set up their own exchanges in the health insurance marketplace declined significantly more in 2014 than among those in the remaining states that have taken one or neither of these actions. This finding suggests that adopting these components is critical to lowering the uninsured rate within states.

Using mobile technology for work linked to more stress. Nearly half of workers who "frequently" use e-mail for work outside of normal working hours (48 percent) report experiencing stress "a lot of the day yesterday," compared with 36 percent among those who "never" check work e-mail outside of working hours. However, workers who e-mail outside of normal working hours also rate their lives better than their counterparts who do not. The same patterns hold true for working remotely outside of working hours.

Depression rates higher for long-term unemployed. About one in five Americans who have been unemployed for a year or more say they currently have or are being treated for depression – almost double the rate among those who have been unemployed for five

weeks or less. The long-term unemployed also spend less time with family and friends than other Americans. Gallup also found that Americans who have been out of work for a year or more are much more likely to be obese than those unemployed for a shorter time.

U.S. veterans report less stress, worry than civilians. Although many veterans face very serious and unique mental health challenges, Gallup finds that among employed Americans, active-duty and veteran populations are more emotionally resilient than their civilian counterparts.

In U.S., 14 percent of those aged 24 to 34 report living with parents. Young adults who live at home are significantly less likely to be married, to be employed full time and to have a college education than those who are the same age but don't live at home. Those aged 24 to 34 who live at home are also less likely to be "thriving" and have lower overall well-being than their peers who don't live with their parents.

Obesity linked to lower social well-being. In terms of social well-being, obese Americans are the least likely of all weight groups to be thriving, while underweight individuals are the most likely to be suffering. This pattern underscores the risk of being at either extreme of the weight spectrum when it comes to social relationships.

Older Americans feel best about their physical appearance. Two-thirds (66 percent) of Americans aged 65 and older agree that they always feel good about their physical appearance, compared with 61 percent of 18-to-34-year-olds. Middle-aged Americans (54 percent) are the least likely to report feeling good about their appearance. Blacks and Hispanics are much more likely than whites and, to a lesser extent, Asians to say they always feel good about their appearance.

LGBT Americans report lower well-being. Americans who identify as lesbian, gay, bisexual or transgender (LGBT) trail their non-LGBT counterparts in all five elements of well-being:

purpose, social, financial, community and physical. The disadvantage in overall well-being is starker for LGBT women than for LGBT men.

Baby Boomers are not maximizing their strengths at work. Although U.S. Baby Boomers have been in the workforce for many years, they are no more likely than younger generations to say that they are able to use their strengths to do what they do best throughout the day. About one in two Baby Boomers plan to delay their retirement, meaning they will remain an influential part of the workforce. Therefore, employers have an opportunity to help Baby Boomers identify and use their strengths to achieve higher performance outcomes.

www.gallup.com



●●● food research
Are food makers engaging in 'leanwashing'?

Diet vs. exercise

Medical research has shown diet to be a significantly bigger factor in obesity than lack of exercise. Yet about half the population doesn't believe that to be the case and it's likely that messaging from food and beverage companies helps shape those mistaken beliefs, according to new research.

Michigan Ross Professor Aneel Karnani and co-authors Brent McFerran of Simon Fraser University and Anirban Mukhopadhyay of

Hong Kong University of Science and Technology analyzed the public statements, philanthropy, lobbying and sponsorships by the food and beverage industry and found evidence of what they call "leanwashing" – perpetuating the notion that lack of exercise is at least as important as diet in caus-

ing obesity. Their paper on the topic, "Leanwashing: a hidden factor in the obesity crisis," was published in the summer 2014 edition of the *California Management Review*.

Previous research showed that people who believe exercise is a bigger factor in obesity weigh more than those



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who believe that diet plays a bigger role. Karnani and his co-authors argue that food and beverage companies are at least partially responsible for this misperception by deflecting the role of diet. “It’s not that they’re deliberately trying to mislead but the industry says things and creates messages that are conveniently favorable to their business,” says Karnani, a professor of strategy. “That perpetuates the mistaken lay theory that lack of exercise is the main culprit for obesity when, in fact, it’s diet. This really matters, because people who are misinformed about the causes of obesity are heavier than people who are well-informed.”

Karnani says it’s a delicate argument to make. Exercise, of course, is good for everyone and in general people need more of it. There are multiple benefits to exercise beyond weight loss. “But in terms of dealing with the crisis of obesity in this country and other countries, it’s a red herring,” he says.

Obesity has become a serious public health problem. Until 1980, less than 10 percent of the population in industrialized countries was obese. Today those rates have doubled or tripled and in some countries two out of three people are projected to be obese within 10 years. Obesity is linked to many chronic health problems and significant costs.

People obtain lay theories about what causes obesity from various sources. About half the population believes that lack of exercise is a key contributor to obesity, despite scientific evidence to the contrary.

Karnani, McFerran and Mukhopadhyay focused on the public statements, sports marketing, lobbying and philanthropy of the 10 largest food companies in the world. What they found was consistent messaging that put much of the blame for obesity on lack of exercise or statements that made the causes of obesity sound complicated. “Balance,” for example, was a common word.

Given the scope of the food industry’s marketing, messaging, lobbying and sponsorships, it’s not a stretch to suggest it helps reinforce the mistaken lay theories, Karnani says. “We found four channels of corporate messaging food companies have used to deflect the public discourse from bad diet to exercise and other factors, likely leading to misinformed lay theories

of obesity, which in turn is associated with increased actual obesity,” he says. “It’s not the only reason people are misinformed but you can’t say it has no impact. These companies spend hundreds of millions of dollars on these campaigns. If it has no impact, then you’d have to believe they’re wasting all that money.”

So what’s the solution? Some countries have imposed a sugar tax, similar to a sin tax on tobacco and alcohol, or banned food advertising from children’s programming. But those steps, especially a tax, seem unlikely in the U.S. Instead, an organized public education effort should be launched to spread the word about the effect of diet on obesity. “Overall, our recommendation is for systematic public health communications to promote the diet theory,” Karnani, McFerran, and Mukhopadhyay write. “This would educate the public that bad diet is the primary cause of obesity and thus help fight the obesity crisis, even while supporting individual choice and responsibility.”



●●● shopper insights How e-commerce firms can woo in-store shoppers

Faster shipping, enhanced privacy

When asked what would make them most likely to make a purchase in-store versus online, of 1,235 American shoppers polled using Google Consumer Surveys by Princeton, N.J., marketing agency Ripen eCommerce, 30.8 percent said they prefer to see or feel the item in person; 29.9 percent want to buy item(s) right now; 16.9

percent believe it protects their privacy; 14.4 percent shop in-store to save on shipping costs; 6.5 percent want to ensure easier/cheaper returns; and 1.5 percent said “other.”

According to Ripen’s Marketing Director David Rekuc, online retailers can capitalize on factors holding consumers back from shopping online by implementing several easy and low-cost changes to their Web sites, marketing strategies and shipping and return policies.

“Our survey found the largest portion of users ‘want to see or feel item in person’ or ‘want an item right away.’ These are obviously two big obstacles for e-commerce companies,” Rekuc says. “But they aren’t insurmountable. Online retailers can offer free samples to get their products in consumers’ hands and, while most small e-retailers can’t offer same-day delivery nationally, there’s no reason they can’t consider it for their local shoppers.”

It should come as no surprise that the chief reason consumers don’t like virtual shopping is because you just can’t feel pixels. Gauging the quality, fit, ergonomics or weight of a product is simply easier in person – and this obviously isn’t something that can be simulated, at least not yet.

Strategy: Don’t get any crazy ideas about 3D printing or virtual reality but do get ideas about getting products in customers’ hands. Send free samples: Take deliberation out of the equation by sending prospects something they can try out. Birchbox took this approach and now has a 50 percent conversion rate! Use the puppy dog approach: Let users “take home” a product with the expectation they can return it absolutely free, no hassles. Throw in a guarantee, free return shipping or anything else that makes it easy to fall in love with what you’re selling. But please don’t mail any actual puppies.

If instant gratification isn’t a hallmark of consumerism, we don’t know what is. When customers want a product, they want it fast – and being able to pounce on the purchasing window while it’s open is a big deal. Jimmy John’s gets sandwiches to sub-lovers faster than they could pick them up, which is so fast nobody even thinks about whether the food is any good.

Strategy: Same-day delivery may not be realistic for every company but even

light offerings can make a big difference for a business. Solve it on a small scale: Even the companies offering same-day delivery focus on manageable areas of operation (case in point: the Seattle-only launch of Amazon Fresh). If you could ship same-day within 25 miles of your fulfillment center, it would mean the world to your nearest buyers. Get the word out: Once you've established an area of same-day operation, up your local PPC advertising to let customers know.

You don't love it when companies constantly mail, text, retarget or generally creep on you, so why would your prospective audience? People want to feel secure while browsing and buying, so anything you can do to bolster a sense of privacy helps.

Strategy: The option to opt-out: Encourage users to let you know when things get too clingy, whether it's an e-mail list or various add-on services. Provide guest checkout: Consumers don't want to give out personal data unless it's strictly necessary – plus this win-win option has been proven to boost conversion. Less fine print: Prominently display your privacy and security policies throughout your site. And if you don't have any, you should probably get around to writing them. Actually bolster security: Talk is one thing but upping your on-site protection is better. Review your checkout process, data storage techniques and security practices to ensure your store's locked down.

Buying online is significantly more cost-efficient than traditional shopping – except when it comes to getting something out the door. And while 14.4 percent may not sound high, ignoring up to a sixth of your audience isn't a great plan, either.

Strategy: Free shipping: Offering free shipping is an obvious, albeit potentially expensive, solution. Even if you have to build the cost into product pricing, the magic of seeing “free shipping” is enough to convince many shoppers. Don't double-dip on delivery: Yes, you can make a lot of money by placing a markup on shipping. But in the long run, it's only going to turn off potential customers while giving competitors an easy way to undercut you. Do an experiment: Send 10 percent of your customers a notice that they've been upgraded to a premium status that receives free

shipping. Then monitor their long-term purchase value versus your controlled base. You may be surprised just how much more you make by eliminating the shipping cost barrier.

Returns are an unfortunate but inescapable fact of the retail world, so it may seem like the best bet is making exchanges and refunds harder. You may have had some one-off experiences that really hurt your bottom line, as well. But in today's world, you're fighting an uphill battle – shoppers expect a pain-free return experience.

Strategy: Don't get caught up in anecdotes of irate customers. Focus on strategies that will keep most of the people happy most of the time. Create and publicize a great return policy: Whether or not individual customers take advantage of your offer, everyone's more likely to buy when they know about and trust in a store's return policy. Do another experiment: Include prepaid return labels in a small percentage of your shipments and see if customers end up returning more products. If so, how much? And do they come back to buy again?

www.ripenecommerce.com



●●● education research College grads more physically active on weekends

Weekdays, not so much

People's educational attainment influences their level of physical activity both during the week and on weekends, according to a study, which found that, on average, those with a college degree are more active on Saturdays

and Sundays than on a typical weekday – whereas for people without a high school degree, the opposite is true.

“Educational attainment predicts physical activity differently on weekends and weekdays,” says Jarron M. Saint Onge, a Kansas University assistant professor of sociology and the study's lead author. “Importantly, we focus not simply on total time people are engaged in recommended levels of physical activity but the quality of the activity by focusing on the average levels of activity intensity per minute by day. An understanding of the factors that reduce time spent in low-intensity or sedentary behaviors can inform activity intervention measures and could potentially reduce socioeconomic status differences in preventable morbidity and mortality.”

While work is a frequently-cited barrier to exercise, the study found evidence of a more complex relationship. For example, those who take more steps (as measured by an accelerometer) during the week – presumably at work – are less likely to be active on weekends.

Saint Onge co-authored the study with Kyle Chapman, a Kansas University doctoral candidate in sociology, and Patrick M. Krueger, an assistant professor of sociology at the University of Colorado-Denver. The researchers examined accelerometer data from the 2005-06 National Health and Nutrition Examination Survey (NHANES), which measures how many steps U.S. adults take per day and the intensity of those steps. By focusing on intensity, researchers can determine the amount of time an individual spends in various activity categories such as sedentary, moderate or vigorous activity.

Chapman says even when he and his co-authors controlled for several factors, such as income disparities and whether individuals mostly sit or stand at work, they still found that educational attainment was associated with people's patterns of physical activity throughout the week. “Education affects people both at the individual level and at their social level,” Chapman says. “Physical activity is encouraged or discouraged in different groups.”

On weekdays, the study found that people with a college degree spend an average of 8.72 hours a day in sedentary activity, compared to 7.48 hours for a person without a high school degree.

According to Chapman, these patterns were unsurprising considering past research has found that less-educated groups of people typically spend more time engaged in occupational physical activity at their jobs during the week. That occupational activity, however, may take place at low energy thresholds, include repetitive motions and may have potentially negative health consequences.

On weekends, a person with a college degree spends an average of 8.12 hours a day in sedentary activity – less than during the week. On the other hand, a person without a high school degree actually spends more time in sedentary activity – 7.86 hours per day – than they do during the week.

Chapman says the study's findings could be useful in developing targeted public health initiatives related to physical activity based on a person's educational attainment. "You have to be flexible. We have to give people different ideas," Chapman says. "We have to have discussions on what works for some and what works for others."

The paper, "Objective physical activity patterns of U.S. adults by educational status," was presented at the American Sociological Association's annual meeting in August 2014. A grant from the National Institute on Aging of the National Institutes of Health supported this research.



●●● financial services Americans still see a home as a good investment

Safe as houses

Despite periods of volatility in the real estate market over the past

few years, over seven in 10 Americans (72 percent) see owning a home as a safe investment. Majorities agree on this point across generations, albeit with considerable shifts from one generation to the next: nine in 10 Matures (89 percent) see home ownership as a safe investment, compared to just over three-fourths of Baby Boomers (77 percent) and seven in 10 Gen Xers (70 percent). Even among Millennials – for whom the subprime mortgage crisis of 2007-2008 and the ensuing financial crisis it helped kick off is likely a more formative experience – the majority still see home ownership as a safe investment (63 percent), albeit with a slimmer majority vote than any of their elder counterparts.

Majorities of Americans also see gold (65 percent) and jewelry (59 percent) as safe investments, according to the Harris Poll of 2,306 adults surveyed online between July 16 and 21, 2014.

Turning to the other end of the scale, eight in 10 Americans see owning one's own business as a risky investment (80 percent), while two-thirds say the same of stocks/bonds (68 percent) and luxury or classic cars (67 percent).

Perceived investment risk varies, as one might expect, according to what one has on hand to invest. As such, it should come as little surprise that those with higher investable assets are less likely to see owning a business and investing in stocks/bonds as risky investments than those with less available to invest.

Owning your own business – 67 percent among those with \$500,000 or more in investable assets vs. 81 percent of those with \$10,000-\$49,999 and 85 percent for those with under \$10,000 to invest.

Stocks/bonds – 52 percent of those with \$500,000 or more in investable assets see this as a risky investment, vs. 70 percent of those with \$10,000-\$99,999 available to invest and 73 percent for those with under \$10,000 on hand for investments.

Slimmer majorities see wine (60 percent), investment property ownership (56 percent) and art (55 percent) as risky investments, though it's worth noting that strong minorities do rate each of these as safe (45

percent art, 44 percent investment property, 40 percent wine).

The perception of wine as a safe investment varies considerably by generation, with half of Millennials (49 percent) and four in 10 Gen Xers (41 percent) rating it safe, compared to fewer than a third of Baby Boomers (32 percent) and Matures (31 percent).

When asked which of these types of possible investments have strong earning potential, stocks/bonds (45 percent), owning an investment property (43 percent) and gold (42 percent) are the top selections, with over four in 10 seeing each as potentially to be strong money-makers. Roughly a third each see owning a home (36 percent) and owning a business (32 percent) as having strong earning potential.

Fewer see investments in art (16 percent), jewelry (14 percent), luxury/classic cars (11 percent) or wine (7 percent) as having strong earning potential.

Generational divides show up again on this measure, with Millennials more likely than any other generation to see strong earning potential for owning one's own business (39 percent, vs. 28 percent Gen Xers, 29 percent Baby Boomers and 29 percent Matures) and investing in wine (11 percent vs. 6 percent, 5 percent and 3 percent, respectively).

What one can afford to invest also repeats as a factor in responses. Those with higher investable asset levels are more likely to see strong earning potential in stocks/bonds (71 percent \$500k+ vs. 54 percent \$100k-\$499.9k, 44 percent \$50k-\$99.9k, 36 percent \$10k-\$49.9k, 39 percent <\$10k) and owning an investment property (54 percent and 52 percent vs. 37 percent, 37 percent and 42 percent, respectively).

Meanwhile, those with less to invest are more likely to see strong earning potential in gold (46 percent <\$10k, 47 percent \$10k-\$49.9k, 45 percent \$50k-\$99.9k vs. 30 percent \$500k+) and jewelry (19 percent <\$10k, 18 percent \$10k-\$49.9k vs. 10 percent \$100k-\$499.9k, 9 percent \$500k+) investments.

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Product and Service Update

●●● text analysis **Provalis offers WordStat 7**

Includes enhanced taxonomy tools

Provalis Research, a Montreal software company, has released WordStat7, which includes a new topic-modeling tool designed to give users a quick overview of the most salient topics in a large amount of text to enable the exploration of the relationships of those topics with other numerical, categorical or date variables. A new link-analysis feature allows users to create network graphs and explore the relationship between concepts and see dashboard views to compare with structured data. Version 7 extends linguistic resources by providing new stemming routines for 18 languages, pattern-based named-entity extractions and improved handling and classification of misspellings, providing even more assistance for the creation of categorization dictionaries. Version 7 also features enhanced taxonomy development tools including support of more wildcard characters and improvements to proximity rules and the keyword-in-context table.
<http://provalisresearch.com>

●●● television research **Product suite for TV measurement**

Piloting in SLC

Sorenson Media, Salt Lake City, has launched Spark, a suite of TV measurement, targeting and analytics software programs. Spark Enlight provides digital TV measurement services, while Spark Enhance handles digital targeting, personalization and interactivity across TV advertising. Spark Engage provides the same services for TV programming. The software programs are currently being piloted on smart TVs with initial rollout planned for the Salt Lake City market.
www.sorensonmedia.com

●●● quantitative research **Schlesinger debuts dial-based tool**

Uses Perception Analyzers

Iselin, N.J., research firm Schlesinger Associates has launched Dials by Schlesinger, a handheld dial, data collection tool using Perception Analyzers to capture quantitative responses to any form of test material. Users can collect and understand respondents' opinions and changing perceptions moment-to-moment, with the goal of reducing the effects of group dynamics. Results can be viewed in real-time. The tool is designed to be a one-stop in-house data collection solution, including acquisition of the latest dial models, dial maintenance and support by trained technical facilitators to guide researchers through their studies. As a mobile solution, Dials by Schlesinger is available across the firm's network of focus group facilities and also in other central locations and environments, upon request.
www.schlesingerassociates.com

●●● data analysis **Quirkos software works with text-heavy source material**

Generates visual reports

Quirkos, a software firm based in Edinburgh, Scotland, has launched a software platform which allows users to code and collate data from large, text-based qualitative sources such as interview transcripts, surveys and articles. As the researchers find themes in their work, the software creates visual reports in an interactive bubble graph. The tool can also generate traditional static reports which can be exported to Word, Excel or CAQDAS.
www.quirkos.com

●●● health and wellness **Ad software targets fitness app users**

Mobile site users, too

FitAd, a New York advertising software specialist, is offering the first mobile and wearable advertising software for fitness app and mobile site users. These consumers, estimated at 46 million, access their apps on average 16 times per month. Via programmatic advertising and direct seller channels, FitAd will match brands with audiences through their apps. FitAd's PrecisionTap platform offers publishers three ways to participate in its network: installation of the FitAd software developer kit, inclusion in the FitAd private marketplace or access to seasonal and event-driven sponsorship opportunities.
www.fitad.com



quirks.com/articles/2015/20150204

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●●● segmentation research

Software connects customer data silos

Discover new segments

Boston technology firm BlueConic has launched Actionable Journey Insights, software designed to connect disparate data silos so marketers have all their customer data in a single place, creating a profile on each individual user and creating customized interactions that can be delivered in real time. Among the additions in Actionable Journey Insights is a segment discovery capability that enables marketers to organize individual users to discover new segments. With this insight, marketers can then, for example, identify the qualities of those abandoning their online shopping carts and improve the experience for this specific segment. www.blueconic.com

●●● mobile research

Sony to offer smartglasses kit

Google Glass, meet SmartEyeglass Attach

Sony has designed a kit to transform any regular eyeglass frame into a pair of smartglasses, similar to Google Glass. The clip-on unit weighs less than 2 ounces and includes a control board with Bluetooth, Wi-Fi, a compass, accelerometer and touch sensors. It produces a 640x400 OLED display which hovers in front of the wearer's eye. It is slated to go into mass production in later 2015 under the working title of SmartEyeglass Attach.

●●● spokesperson research

IME Star Index incorporates GfK MRI survey data

Adds Fan View and Brand Alignment features

InterMedia Entertainment, a Los Angeles marketing firm, has expanded its IME Star Index market research tool by adding data from the Survey of the American Consumer by GfK MRI, New York. The Star Index evaluates and ranks the spokesperson potential of celebrities. The new data allows two new features, Fan View, which includes demographic and lifestyle preferences of a celebrity's fans, and Brand Alignment, which provides information on the brand preferences and purchasing trends of those fans. www.intermediaentertainment.com/dr-star-index

●●● quantitative research

Qualtrics, CFMC partner for sample management

Cross-mode evaluation

Provo, Utah, software firm Qualtrics and San Francisco researcher CFMC have partnered to combine CFMC's Survox survey call center software with Qualtrics' Research Suite, a move designed to provide centralized sample management across multi-mode options. With Qualtrics and CFMC, researchers can repurpose existing Qualtrics surveys as phone surveys. Both online and phone survey responses are stored in a centralized location for cross-mode evaluation. All analysis and reporting are conducted via the capabilities built into Qualtrics Research Suite while sample

data are stored and call center operations are managed by CFMC's Survox solution. www.qualtrics.com

●●● hybrid research

Askem Know uses qual/quant approach

Aims to be friendly, playful

Tel Aviv, Israel, software firm Askem is offering Askem Know, a qual/quant research platform, designed to engage complex audiences across a wide demographic by tapping into existing ad-targeting engines using a patent-pending, meta-targeting algorithm. The platform aims to target consumers in interactive conversations on various social networks, mobile apps and blogs in a way that is friendly, playful and seamlessly integrated into their digital experience. www.askem.com

●●● Briefly

■ Boston researcher InCrowd has designed a new app which allows users to question groups of screened health care professionals and then receive their responses within minutes. The app includes features such as advanced branching logic and data visualizations with Power Point or Excel exports. www.incrowdnow.com

■ Fort Washington, Pa., research firm TRC has posted a video of its fall 2014 event featuring Vlad Griskevicius, a University of Minnesota professor of marketing, discussing his new book *The Rational Animal*. It is available at <http://trchome.com/news-a-events>

■ Berlin technology firm SensoMotoric Instruments has upgraded its eye tracking platform for the Oculus Rift DK2 virtual reality headset to include an C/C++ SDK and support for popular VR engines such as Unity and Vizard. www.smivision.com/en.html

■ San Francisco software firm Adobe has launched Intelligence Location Marketing, which allows companies to send content to smartphones which come into range of Bluetooth-enabled iBeacons, which can be positioned in any retail location. The system also offers a dashboard designed for real-time viewing of all mobile app data. www.adobe.com/solutions/digital-analytics.html

■ London marketer MediaZest has launched MediaZest Retail Analytics, which uses facial recognition technology to help retailers track shopper dynamics. The software utilizes the Cognitec FaceVacs Videoscan and was developed with Argus Global Biometrics Technologies, Sydney, Australia. www.mediazest.com

■ New York-based digital marketing firm MediaMath has integrated its service with Apple's iAd platform. This move is designed to allow marketers to utilize Apple's targeting data and find the most appropriate audiences for their ad campaigns, then run the campaigns within the apps on Apple devices. www.mediamath.com

■ According to *AdWeek*, Facebook, San Francisco, is providing a new platform, Grapevine, which can act as a real-time focus group. Advertisers can monitor discussion by Facebook users on specific topics and then provide ads custom-

ized to the discussion. However, the platform is available only to high end advertisers, based on bankroll.

■ Encino, Calif., researcher uSamp is extending its on-demand research platform Instant.ly Concept Test in the U.K., France, Germany, Italy and Spain. The platform had launched in the U.S. in July. It aims to provide insights using a nationally representative consumer sample, leading to screening new product ideas within a few days. www.instant.ly/concept-test

■ London-based Ipsos Healthcare has begun a study of U.S. laboratories involved in cancer biomarker testing, the Oncology Molecular Diagnostics Lab Mapping. The study data is aimed at helping subscribers to examine the type and structure of the laboratories and the volume of their work, identified by cancer type and methodology. Ipsos plans to expand the study to Europe (France, Germany, Italy, Spain and the U.K.), Australia and China. www.ipsos-na.com

■ New York marketing firm PageScience has launched its Health Insight dashboard, designed to match pharmaceutical brands with Internet sites on any of 60 major health condition categories and then deliver ads specifically to those pages. The PageMatch technology aims to rank pages based on historical ad performance, viewability, sentiment and content. The health categories

include allergies, cancer, diabetes, orthopedic and pregnancy. www.pagescience.com

■ East Sussex, U.K., software firm Mobikats is offering its Beura iBeacon Mobile Marketing Platform. It is geared toward allowing brands to track store, mall, museum and airport audiences in real time, sending relevant ads and offering reward points and service information. The platform is also designed to create heatmaps of app audiences over large spaces. www.mobikats.com

■ Stockholm firm Tobii Technology has released a new EyeX plug-in for Unreal Engine 4, designed to simplify the integration of eye tracking in games, entertainment software and office and productivity tools. www.tobii.com

■ New York digital marketing technology firm MediaMath has launched a new Tr app designed to give marketers access to the Online Campaign Ratings of New York researcher Nielsen. Users will be able to check the efficacy and reach of their campaigns, determine their daily reach, frequency and TV metrics and examine the demographic and geographic characteristics of their audiences. www.mediamath.com

■ San Francisco software firm App Annie has launched Audience Intelligence, a

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tool for in-depth analysis of the demographics of app users, related apps and sentiment data. The software can be bundled with the firm's Store Intelligence software or purchased as a standalone. www.appannie.com

■ San Antonio software firm Promoter.io has released an analytics platform which can automate the delivery, calculation and feedback loop of Net Promoter Score customer loyalty programs. The new program is self-service, allowing users to identify their strongest advocates, increase loyalty and receive recommendations. www.promoter.io

■ Paris-based researcher Kantar Media has launched its Twitter TV Ratings service in Spain, following its acquisition of The Data Republic, a Barcelona-based TV and social media analytics agency in April. Kantar Media had recently enhanced its Instar Social TV platform which is used in Spain and the U.K. www.kantarmedia.com

■ Toluna, a Wilton, Conn., researcher, has launched a short-term panel product, PanelPortalLight, which can be launched in less than four weeks and can serve as a trial or short-term community. PanelPortalLight can accommodate all PanelPortal engagement features and can host up to 2,000 members. www.toluna-group.com

■ Voice Polls, a New York Internet company formerly known as Poutsch, has updated its polling app to make it available on iOS, Android and the Web. It includes a community of users who receive payment for their answers. Customers should be able to create a poll, target appropriate Voice Polls users and get results in an hour, the firm claims. www.voicepolls.com

■ Reduce Data, a Mountain View, Calif., information technology firm, has launched a new platform which incorporates artificial intelligence and real-time data to help marketers deliver personal-

ized ads across multiple devices. The firm also can analyze the effectiveness of the ad campaigns, while they are alive or after they ended.

www.reducedata.com

■ Lexalytics, a Boston software firm, has launched an updated version of Saliency, its multilingual text analysis software. The program is designed to assess customers' intent to buy, sell, recommend or quit by extracting the sentiment and tone of their blogs.

www.lexalytics.com

■ Boston software company Data Ladder has released its latest version of DataMatch Enterprise, which provides data matching, data cleansing and a new mid-process cancellation feature. The updated version is designed to provide more speed and efficiency and offers improved matching statistic reports.

www.dataladder.com

■ San Francisco marketing firm inPowered has launched inPowered 2.0, a platform which charges advertisers based on consumer's actual engagement with the ad, defined as reading or sharing the content, rather than on ad clicks.

www.inpwr.com

■ Facebook has released an updated Android app which displays trending stories, with a similar update to its iOS app coming soon. The app allows users to tap on a trending story and see news articles, posts from people who are part of the story and posts from the user's friends and groups. The desktop version of Facebook had included a trending section since January.

■ Mopinion has launched a software program, Conversion Insights, to alert retailers when online customers abandon a shopping cart and to collect and analyze feedback before, during and after the online purchase process.

mopinionlabs.co.uk

■ New York researcher ORC International has created an online communities divi-

sion, ORC Communities. It will offer a platform for both project-based and ongoing ventures, providing idea generation, product development, concept and ad testing and white space analysis. The new division will be led by Jennifer Adams.

www.orcinternational.com

■ Midwest Video, Troy, Mich., has launched M-Stream, a new videostreaming service which only requires Internet connectivity to be available, allowing it to be used in focus group facilities, hotels, convention centers, homes or vehicles.

www.midwestvideo.com

■ Answers Corporation, a St. Louis-based Internet and software firm, is now offering its Employee Experience measurement product, which uses ForeSee's predictive methodology to gauge employee satisfaction. The product offers survey development, analyst support, executive reporting and an online portal for monitoring survey results.

www.answers.com

■ Yandex, a Moscow search engine firm, has launched the Yandex Data Factory. The technology will integrate its software for machine learning, image and voice recognition, deep neural networks and natural voice processing and will assist clients in analyzing data from sensor readings, audio and video recordings and order and transaction data.

www.yandex.com

■ Prezi, a San Francisco software firm, has added a feature to its cloud-based presentation software which allows users to deliver their presentations remotely. Users can work with partners who already use Prezi or provide a link to interested participants.

<http://prezi.com>

■ Parllay, a Kirkland, Wash., software startup, has launched Parllay Studio, which identifies and repurposes social content, and Parllay Channels, which builds social hubs for integrated loyalty marketing and commerce.

www.parllay.com

■ Red Carpet Research, Stockholm, has designed LuxuryOpinions.com, a panel of affluent and high net worth consumers. Each panelist goes through an eight-point validation process before being included in surveys. At press time, the panel was scheduled to launch in the U.K. in January and be rolled out to new markets every six to eight weeks. www.redcarpetresearch.eu

■ Stockholm, Sweden, software firm Cint has partnered with London researcher Opinium to create a panel of independent financial advisers, the first B2B panel for Cint in the U.K. www.cint.com

■ DataHero, a San Francisco software firm, is offering a program which integrates with Google Analytics to create charts based on site traffic data. The charts can be customized according to sources, campaign goals, region and other factors. <https://datahero.com>

■ San Francisco technology company Apigee is expanding its Apigee Edge API platform to include a dashboard which measures response time, diagnostic tools and customized reporting according to selected variables. www.apigee.com

■ MarketResearch.com, Rockville, Md., is partnering with both CMR Market Research, Longport, N.J., and Kentley Insights, New York, to allow MarketResearch.com to market and distribute the CMR and Kentley proprietary market analyses through the MarketResearch.com site.

■ SoapBoxSample, a Los Angeles-based researcher, is partnering with True Sample to utilize its Sample Validation and Multi-Device Fingerprint software solutions. The Multi-Device Fingerprint product is designed to prevent duplication of participants by analyzing the characteristics of the devices respondents use, thus identifying the same participant across multiple devices. www.soapboxsample.com

■ U.S. television firms FOX, Tribune Media and Univision have joined with Timeline Labs, a Santa Monica, Calif., social media analyst, in a venture called NewCoin. Using software from SeaChange International, New Coin will create a broad-based tool to measure audiences across both linear and digital platforms. A pilot project in the Dallas market is planned.

■ Market Publishers Ltd., London, and the Travel & Tourism Intelligence Center have partnered to allow MarketPublishers.com to distribute and sell the Travel & Tourism research reports. www.marketpublishers.com



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Tandem segmentation: Getting your product to sell itself

| By Michael Lieberman

snapshot

A case study application of how a fictional food maker could use tandem segmentation to better understand its customers.

Segmentation is the process of classifying a market or customer base into distinct attitudes or behaviors. The segmentation process entails segment identification, segment characterization, evaluation and target segment selection. Market structure, consumer perceptions, shopping behavior and branding images are all taken into account.

There are many ways to make better decisions and improve market ROI. Segmentation can help the client: enhance new product development; make sense of patterns of consumer behavior linked to a brand or product; and determine the motivations for consumers to buy their product or service.

Segmentation cuts in different ways (pun intended!). We are going to focus on one. I will describe a particularly effective tandem method we often deploy for comprehensive segmentations. The tandem method is to conduct a factor analysis, followed by a cluster analysis. The technique is post hoc (data collected from a consumer survey) and covers not only the usual suspects of frequency and purchase behavior but also lifestyle and attitude issues that are associated with product usage. It combines many different dimensions of brand consumption and blends them into specific and informative characterizations.

Our fictional client is the Guaranteed Food Corporation (GFC). GFC is commissioning a major study for its Health Valley line of products, which includes healthy selections for breakfast, granola bars and other processed healthy food choices. The sample is comprised of those respondents who claim that they purchase healthy

food alternatives on a regular basis.

The lengthy questionnaire explored a range of purchasing, behavioral, health and lifestyle attitudes. GFC's goal was not simply to identify its core customers but to also understand them. The company wanted to continue its bond with Health Valley's main consumers and also attract more like-minded people to the Health Valley product line. GFC wanted to dig deep to give the Health Valley brand team the full picture. We were going to provide it.

Measure of separation

Every post hoc segmentation needs a measure of separation between the final segments. These are often referred to as business rules. The three most common business rules are: latency of purchase, frequency of purchase and amount spent.

Consumption variables in the Health Valley study are de facto business rules. They are variables within the study that allow us to compare segments based on important discriminators for the Health Valley brand. Consumption variables are descriptive; that is, they are used for comparison purposes between segments and are not input into the cluster analysis itself. Below are the consumption variables – business rules – that we used to compare Health Valley segments:

- monthly spending on packaged health food;
- percentage of segment that are Health Valley customers;
- number of Health Valley products purchased in past month (non-customers=0).

Among other questions, the Health Valley



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Figure 1: Shopping Behavior Factor Analysis

	Healthy Food Shopper	Frugal Shopper	Convenience Shopper
Buying healthy food is more important to me than buying what's on sale	0.78	-0.24	-0.12
I am willing to give up convenience in order to eat healthier foods	0.78	-0.03	-0.16
I will prepare a healthier meal even if it means more effort than a less-healthy option	0.74	0.10	-0.26
Using a shopping list ensures I make healthier food choices	0.59	0.54	0.02
I use coupons for the majority of food items that I buy	-0.11	0.72	0.00
Using a shopping list ensures I stay on budget	0.34	0.69	0.04
I always buy what's on sale	-0.34	0.55	0.29
I look for packaged foods that are easy to eat on the go	-0.16	0.12	0.71
I choose what I eat based on what is most convenient	-0.38	0.11	0.71
I believe you have to sacrifice convenience in order to eat healthy	0.24	-0.04	0.69

Figure 2: Shopping Behavior Segments Consumption Variable Summary

Consumption Variables	Monthly Spend on Packaged Healthy Food	% Segment Health Valley Customer	Number of Packages Health Valley Purchased in Past Month (non-customers=0)
Healthy Food Shopper	\$97.03	68.0	3.4
Frugal Shopper	\$68.47	54.7	2.3
Convenience Shopper	\$59.82	48.3	1.9

questionnaire contained arrays of attitudes that respondents were asked to rate on a discrete (1-to-7) scale. For the segmentation, the following dimensions were queried:

- food purchase behaviors;
- exercise and wellness activities;
- lifestyle attitudes;
- shopping behavior;
- health food attitudes; and
- motivational reasons for healthy living.

The first step is to use a common marketing research technique, principal components analysis, commonly referred to as factor analysis. Factor analysis finds underlying structures of association between variables. Put another way, factor analysis creates “families” of attitudes that tend to be rated similarly. Figure 1 shows one example output of the six factor analyses run for this study. The names of the factors at the top (e.g., Healthy Food Shopper) are subjective and are normally based on the attitudes contained in the analysis. Figure 2 shows the consumption variables by each of the three shopping behavior segments.

When programmed, factor analysis

creates variables for each factor. Each respondent receives a factor loading (similar to a correlation coefficient) for each factor. For our example, three new variables were created. Each respondent received a score for each of the new variables. A respondent is placed into the family where he/she has the highest score.

For the six Health Valley factor analyses we set each factor analysis to have three factors (they generally run between three to six). The table in Figure 3 summarizes the families (factor analysis results) that were created.

To sum up, what we have created are six new variables, each with three values. Each respondent has one value in each of the six new variables.

Perfect second step

K-means cluster analysis aims to partition observations into x number of clusters in which each observation belongs to the cluster with the nearest mean, serving as a framework of the cluster. K-means is not my favorite clustering algorithm: if the data is varied, the results can be murky. The k-means algorithm, on its own, is too sensitive to outliers. However, for our tandem method, it is the perfect second

step. I'll explain below.

We have six new variables, each with three values. Our next step is to create a new variable for each value. That is, for the first segment variable, for the first value, a respondent receives either 1/0. If he has a 2 for that segment, he receives a 1 for the second new variable.

Essentially, we create 18 new variables. Each respondent has a value of 1 in six of these. K-means clustering now comes into play. Given that this method works on Euclidean distance, we are able to calculate each respondent's distance from other respondents based on their six new variable memberships.

We can see which of the 18 subgroups are in close proximity. In order to simplify the example, we have reduced the Health Valley solution to three consumer groups. Here are the final segment results for the Health Valley study:

	Percentage of Consumers
Health Valley Core	31
Weight Management	43
Medical Munchers	26

Figure 4 shows a multidimensional scaling visual based on the same Euclidean distance employed in k-means. It shows which step-one clusters surround our final Health Valley segment solution. Figure 5 shows the consumption variables by the final Health Valley segments.

Key data

Now that the two-step process has been completed, we have some key data about the Health Valley core customer:

- They make up about 30 percent of the health food market.
- They tend to purchase vegetables along with Health Valley products.
- They view “health and vitality” as a central diet vision.
- They read the ingredients of the products they purchase.

Within the six dimensions that were synthesized, in step one of the segmentations there were more than 70 individual statements. GFC would like to know which of those are major

Figure 3: Step One Factor Analysis Clusters

Food Purchase Behaviors	Exercise and Wellness Activities
Socially Responsible	Soy and Yoga
Read-the-Ingredients	Fresh Food, Fruits and Veggies
Reduced Calorie/Fat Purchaser	Fitness Freak

Shopping Behavior	Health Food Attitudes
Healthy Food Shopper	Examine Ingredients
Frugal Shopper	Pay More for Health Food
Convenience Shopper	Healthy Food Skeptic

the individual statements that might appeal to present and future Health Valley consumers using statistically significant descriptors.

Many companies run large segmentations and then use the results over the next few years to classify respondents for additional studies. The next step for Health Valley, then, would be to develop a reclassification scheme for its segmentation. Ideally, it would like to produce a screener that asks prospective respondents several questions in the screener. The field house would then have an algorithm that would classify them for purposes of questionnaire skip patterns and tabulations.

We generally provide that service, using a series of regressions and then a discriminant analysis method to narrow the screener to, say, eight to 10 questions that would classify future prospects into the Health Valley segmentation.

Vital marketing tool

Not every dollar spent on advertising and sales is created equal – some of those dollars generate far more revenue than others. Segmentation is a vital marketing tool. Peter Drucker had it right when he spoke of the art of segmentation and its marketing extension: “The aim of marketing is to know and understand the customer so well the product or service fits him and sells itself.”

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Figure 4: K-Means Cluster Visual



Figure 5: Final Health Valley Segments Consumption Variable Summary

Consumption Variables	Monthly Spend on Packaged Healthy Food	% Segment Health Valley Customer	Number of Packages Health Valley Purchased in Past Month (non-customers=0)
Health Valley Core	\$134.21	79.4	5.5
Weight Management	\$91.83	56.0	3.3
Medical Munchers	\$57.92	44.9	1.8

drivers for messaging Health Valley customers. So, among the next steps

Health Valley could take is to run descriptive regressions to characterize

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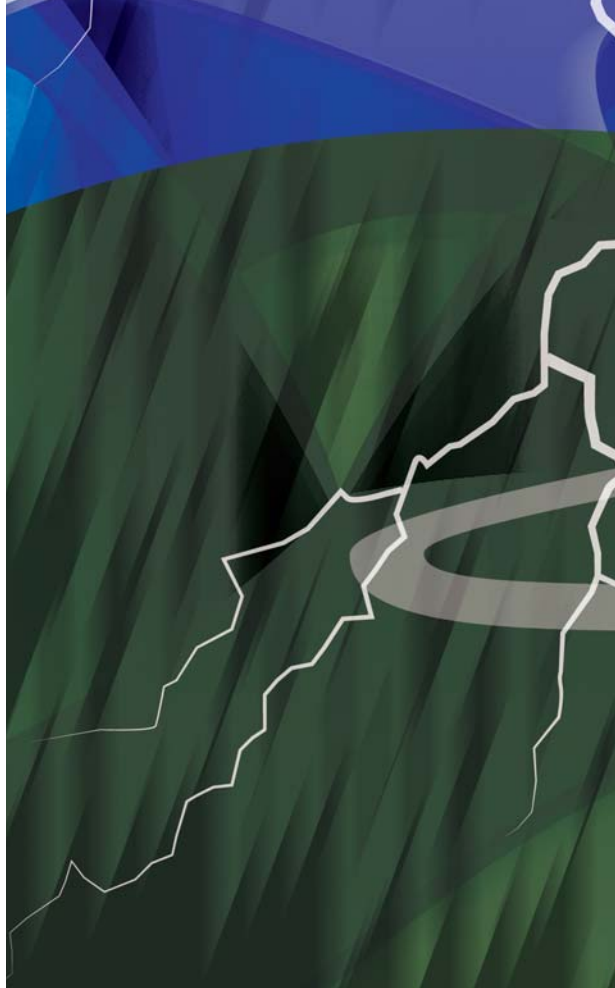
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Easy answers

Responsive design and the road to happy research participants

| By Ken Berry



snapshot

Can creativity overcome the size, functionality and attention-span constraints of the mobile survey taker and allow online research to live on in a changing landscape?

As the percentage of people taking online surveys on a mobile device continues increasing, there has been concern over the user experience as well as a shift toward more simplified and shorter studies. It's undeniable that we are on the road to a reality where the majority of online research will not be done on a PC. While we can't change where the road is headed, we can ensure that it's properly paved.

It's widely assumed that studies utilizing advanced techniques, or any survey content that needs a large amount of screen real estate, cannot be properly done on the screens that are available to mobile users. This is a dilemma, as not all research can be done with a series of standalone, five-answer, single-punch questions. So what is a researcher to do? Do we torture the most important people in our research process with instruments that are, for lack of a better description, annoying? Do we continue to create surveys that require more zooming in and out than an "extreme close-up" on a segment of *Wayne's World*?

Not to worry. With a little creativity and the tools that are available to today's Web programmer, we can ask the questions that need to be asked without asking too much of those we trust to give the answers. We have a responsibility to the individuals who supply us with our research sustenance. Let's not ask them to travel this road to the future on a bus with bald tires and a driver that is a few days behind on his shower schedule. Instead, let's be aware of their needs and use the technology that has been created along the way to pick them up in our limo and ride down this road together in style. Better yet, let's retrofit the limo with some hover conversion and eliminate the road altogether. Great Scott!

Caused hand cramps

In the past 10-15 years, researchers have seen vast advancements in how the world can be asked for feedback. The move to the Internet has



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increasing. So we don't have to be miserable in our technologically-advanced apartments! Rather than saying things like "Remember when our bathroom was the size of this living room?" we can say things like, "Remember when we had to brew a pot of coffee all at one time?"

Other industries have been tackling the screen-size problem for a while now and it is time for ours to join the party. Have you shopped on Amazon or used Google recently on your mobile device? Did you notice that they did not redirect you to m.amazon.com or m.google.com and serve up a lesser version of the site? No, they offered you pretty much the same functionality you are accustomed to on your PC in a format that works well on your phone. The experience can be so pleasing on a mobile device that not only will you not avoid the site, you will actually use it more often. Consider this snippet of inner dialogue: "I have a few minutes here . . . just me and my mobile device. You know, I haven't called my mom in a while. Let's see what deals there are on Amazon." (Sorry mom!)

Now imagine that the last sentence was "Let's knock out one of those online surveys that I love so much!"

We have to change our goals before we attack the problem. The goal is not to make online research bearable but rather to make it an enjoyable experience. And before you say to yourself "This guy is delusional," I am well aware that people who can't wait for their next chance to take an online survey will not be the norm. We are never going to get to the point where your survey is the highlight of someone's day. Still, we can make it so that after the survey is done there is a feeling that it was enjoyable enough that they wouldn't mind doing it again sometime soon. This used to be easier when there was only one screen resolution and browser options were limited.

Make it more responsive

One of the most recommended ways to make a Web page work on multiple devices without changing its core content is to make it responsive. In simple terms, responsive design is technology that will automatically adjust the content and navigation of a Web site to the screen size it is being viewed on. Instead of having a separate mobile site with different templates, with responsive design there is one template and one set of content. Additionally, the experience on all devices is tied together

allowed us to create questionnaires that would have previously caused hand cramps and required multiple sharpenings of a No. 2 pencil. Advancements in Web programming have allowed us to make surveys more engaging (via shelf sets, drag-and-drop exercises, sliders, etc.) and have reduced data collection bias by making surveys more in line with how people make choices in the real world (via conjoint, discrete choice, max-diff, etc.). Many of these capabilities and advancements have been enabled by steady increases in computer screen real estate and because of plugins that allow increased interactivity. Some of us have been in the online research game long enough to remember having to deal with 640x480 resolution. How were we able to get by? The answer is simple: We hadn't grown out of it yet. Atari is pretty awesome when you've been playing Pong. I sure do miss my 2600!

A 640x480 screen is akin to your first apartment, or better yet, your dorm room. You can fit everything you need in it because you don't need a whole lot. Over the years we have moved out of the dorm room to the apartment, and then to the house, and then to the bigger house. I moved into a mansion last year when I purchased my first 2560x1600 monitor. But now, with the ubiquity of mobile devices, we have to move back into the apartment – albeit a deluxe apartment (um . . . in the sky – sorry, I couldn't resist). So what are we going to do with all those things we need? Do we put them in storage and live miserably while reminding ourselves how cool it was when we lived in a house? Or do we use the advancements in technology to make this deluxe apartment DY-NO-MITE!? I think most of us would agree that the latter is far less depressing.

Fortunately for those of us passionate about market research, we aren't going to go backwards with the move to mobile devices and their apartment-sized screens. While screen sizes are getting smaller, the resources that are available for us to creatively solve the problem are

by the design. Because there is only one design, there is more cross-device consistency. This is imperative in the research world, as a consistent instrument means consistent data. Not to mention, researchers don't have the time or money for an entirely different survey template for their mobile participants. Responsive design is inherently forward-thinking. Because it adapts to the screen size, – no matter what the latest cool device your audience get their hands on this year or in years to come – your study will adapt accordingly.

The digital publishing industry has fully embraced this technology. Years ago, it faced the same challenge that we are facing now with many of its readers moving toward an online and then mobile method of getting their daily news and their favorite periodicals. Its solution has been to, with very few exceptions, move to a responsive design. Sites like Time.com, Newsweek.com and BostonGlobe.com are all examples of responsive solutions to the variability of the browser. The browser is so varied in its specifications that JavaScript pioneer Douglas Crockford once referred to it as “the most hostile software development environment ever imagined.” Never before had I heard it summed up with such perfection.

Cannot afford to lose these people

With all of the advances in Web development at our fingertips, it is our job, nay, our duty to make the user experience pleasing to those who are kind enough to give us their opinions (while getting an incentive :-P). We cannot afford to lose or irritate these people. Is there anything more biasing than emotion? Imagine this as a survey intro: “Today we'd like to understand what your opinions are about our client's new idea while under duress from the survey instrument that you will be using. Please scroll way down to the bottom of the screen to click the button to begin your ordeal.”

They don't deserve it and they won't continue to put up with it.

Although it is geared toward

mobile consumer sites, some statistics from Google's research on how people react to sites not designed with mobile in mind are telling. In September 2012, 50 percent of people in a Google study said that even if they like a business, they will use it less often if the firm's Web site isn't mobile-friendly. If that holds true for a business that they like, what does it mean for online surveys?

So what are people looking for when they do things on mobile devices or on the Web in general? The top two answers are speed and usability. Let's face it: We live in the age of tools like Visa Checkout, where people are expecting to make purchases online with one hand while catching footballs from three of their favorite quarterbacks with the other.

Let's get “real world” for a second. While catching footballs from famous quarterbacks is not an everyday activity for most, there are many daily activities that do eliminate the use of our other hand. Let's make it easy for the coffee drinker to participate in the coffee study. Let's make the survey on baby wipes simpler to answer for a mother or father who is holding a baby. In addition to making the survey content look good on all devices, let's use a little ingenuity and some JavaScript to make them easier to take. Together we can stop daily activities from being a deterrent to giving feedback about one's daily activities.

Way of thinking

While the technical solutions would be based on what you are looking to accomplish, I can suggest a way of thinking as well as mention a few things that we think are important when creating a survey tool. To save you from reading it over and over again, let's preface every statement in this section with “To the extent that you can. . .” Additionally, I'm hopeful that you will not dismiss any statement with “I can never do that.” Agreed?

Let's start with the permission-to-play items. For starters, make sure your content is visible on smaller screens. Most call them mobile devices but, from a content

standpoint, it is easier to think of them by their screen size, as the other details matter little to content. Earlier we talked about using responsive design to get this done.

Next, you need to ensure that your page can handle touch events. Without adding touch support, much of your instrument's fancy click functionality won't even work. There are plenty of JavaScript libraries out there that make adding this as simple as adding one line to your html header. This also makes development easier, as you don't have to write a handler for both click and touch.

Lastly, consider your bandwidth. While the advancements in mobile broadband are mind-boggling, there are pockets of slower service, phones that are not able to use the more advanced service and plans that are limiting to data use. Make this something that your users don't have to worry about by ensuring that you don't use any more bytes than you need. Until these items are taken care of, it's most likely impossible to work on the more progressive advancements in ways to ask questions.

We need to think of our surveys and how people take them. Let's put ourselves on the other side of the survey tool and make an effort to improve the experience. It's not about making the five-minute exercise take four minutes but rather the two-second transaction take one. Okay, it's about both. But the latter happens on every survey, sometimes hundreds of times. It should not take a few seconds for someone to successfully hit the bull's-eye that is a radio button or checkbox. Add JavaScript to the area around the input to increase the clickable space. Better yet, bind a click on the answer text itself to the input to make it even easier. To go the extra mile, add a style to the answer to show that it was selected and eliminate the radio button or checkbox altogether. That is one less thing for you to find space for. Once you start addressing one concern, other advances become apparent. Suddenly you are like Forrest Gump out for a morning jog. “I figured I ran this far, might as well keep on running!”

Difficulty clicking on inputs is primarily a mobile device problem. But there are ways to increase transactional efficiency on a PC as well. I'd like to suggest that the most efficient way to get information from a PC user is not the mouse. Wired or cordless, laser or rollerball, standard or trackball, the mouse can turn our surveys into digital Ouija boards. Oh great and powerful Ouija, on a scale of 1-10, how would you rate your overall satisfaction with this product? In no way am I saying that the mouse is not an amazing and useful tool and I mean no disrespect to Douglas Engelbart, its inventor. A mouse will not be as efficient as a keyboard until you design one with 101 buttons. Um . . . and not then either. And yet, aside from text inputs, we've all but ignored the keyboard as an input device. If you ever get the chance to see a PC gamer work in a desktop environment, you will have a new appreciation for the power of the keyboard. Gamers use a keyboard like a Jedi uses The Force. All it takes is a little JavaScript, ingenuity and some light user instruction to offer some additional freedom from our rodent-named pointing device to the rest of the population.


But usability does not stop at reducing the time survey takers need to do certain actions. If the action is a requirement, let's do it for them! Automating the required is at the core of creating efficiency. We should not need our survey-takers to shut off their blinker after taking a right-hand turn. Yes, not all efficiency enhancements are flashy! We are already doing this on a low level. When entering text in a "specify" box checks the associated input, that's automation. But we can automate other actions like scrolling a grid when an item is selected. If we couple that with creating a grid that only shows one row at a time, and sprinkle in a little responsive design, we've got a grid question that is mobile-friendly and requires zero scrolling from the survey taker. Yahtzee!

A better understanding

Regularly putting ourselves on the other side of our research instru-

ments gives us a better understanding of the people who give us our information. Being more in touch with them is our goal as researchers. It will allow us to ensure that our tools create an efficient environment for them to give feedback. A good survey is like a good referee: They are there to make sure everything goes smoothly but they do not affect the outcome.

There are many gains to be made from looking at the survey-taking process as a whole and adding re-

sponsive design, usability enhancements and automation. Your abandonment rate will be lower, your length of interview will be shorter, your data quality will be better and the people taking your surveys will be less fatigued. If we build instruments that are respectful of their time, they will be more likely to give it. 

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●●● mobile research

Right here, right now

Reducing survey bias by capturing actual moment contexts

| By Zachary A. Schendel, Frances James, Sarah Reneau and Dave Decelle



snapshot

Netflix researchers explore the differences between e-mail and push-notification smartphone surveys in capturing in-the-moment responses to questions about video-viewing choices.

Recently, Netflix set out to explore the influence of one's context on video source choice in the actual decision moment. When you decide you want to watch video content, what drives you to choose Netflix or another source, like live TV?

Following a foundational series of video diaries and in-home ethnographies, hypotheses were formulated around drivers that might push Netflix members toward or away from the service. Drivers could be both implicit (e.g., needstate) or explicit (e.g., time of day). A survey was created to capture two key dependent variables for each driver: the fraction of moments in which a driver occurs; and the impact of each significant driver on the odds of a Netflix choice versus the competition (the analysis used was binomial logistic regression).

The business goal of the project was to prioritize the most frequent drivers that had the largest negative impact on Netflix's odds of being chosen; in other

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words, the most common moments in which Netflix members tended to choose competing services.

The research plan hinged entirely on capturing valid, bias-free, in-the-moment data on a massive scale. Putting aside typical survey biases (e.g., responder bias, panel self-selection bias), there were two additional important sources of bias that needed to be accounted for by this survey: memory bias and observer bias.

Memory bias: This comes into play when a participant attempts to recall certain facts about a context that occurred in the past. Memory can be flawed and selective (Cann, McRae and Katz, 2011) and privilege recent events (e.g., recency effect in Crowder, 1976). Participants may be better at recalling the actual name of the show they watched than the needstate they were attempting to fulfill when it was chosen. They might also have different opinions of the moment after completing the show than they did in the moment when it was first chosen. Where were you the last time you watched video? That's easy to recall. Now, can you recall how you were feeling or what mood you were in immediately before you made the choice?

Observer bias: This comes into play, for example, when an observed participant will change their behavior simply because they know someone else is watching them. The classic example is the Hawthorne effect, found originally in the 1920s at the Hawthorne Works Electric Company (Roethlisberger and Dickson, 1939). It was observed that any manipulation of the work environment had a positive impact on worker productivity. Later it was hypothesized that the real driver of productivity was simply the fact that workers knew their work was being observed. This is important for the current research because asking a participant to wait to describe the next context might artificially impact the choices they end up making. If you knew you were being observed, would you decide to watch *Real Housewives*?

To attempt to cancel out these biases, the survey always asked about the current moment. If there was no current moment, then the survey came in two forms: Next and

Previous. For the Next version, if the participant was not actually watching something at the moment they received the notification, then they were instructed to wait until the next viewing moment to fill out the survey. For the Previous version, the participant recalled what happened during the last viewing moment they had.

Methodologies

E-mail survey: One of the most common quantitative research methods employed at Netflix is the e-mail survey. E-mail invitations will remain in an in-box (or junk mail) until a participant checks their e-mail. When they click on the link in the e-mail, the survey typically opens in their device's Web browser.

There are some drawbacks to e-mail surveys that are particularly important for this exploration. First, even if a company sends the e-mail survey at a specific time, if a participant is unaware it is available then the survey will not be completed at the targeted time. Second, if the participant is unable to fill in the survey upon receipt because of device constraints, then the moment will have passed before it can be captured. For example, for participants who do not own or are uncomfortable checking e-mail on a smartphone or tablet, a laptop/desktop computer would need to be available at the target moment. Finally, the device might also bias participants away from important yet uncommon contexts. For example, if a participant was at a friend's house during the target moment the e-mail was sent but didn't see the e-mail on their computer until they got home, they might end up answering the survey about a completely different moment that occurred at their own home instead of the moment at their friend's house. To help alleviate this potential issue, the participant was only asked to recall a single moment rather than an entire day's worth of moments.

Push-notification survey: Another less common method that has been used at Netflix is the push-notification smartphone survey (e.g., through Research Now). The smartphone is an inherently omnipresent and personal device that will accompany you throughout all possible viewing contexts. In this method, participants who

have opted into receiving push notifications receive a message that a survey is available on their smartphone. Clicking on the notification opens an app that contains the survey.

There are some drawbacks to the push-survey method as well. Because the methodology and technology are relatively new, panel size, target population representation and logistics can all be issues. One's ability to recruit enough people can be impacted, especially if a niche audience is desired.

For this research, the recruit was for Netflix members who watch at least once a week and were also willing to take part in the study. Incidence was rather low. This can also have an impact on just how representative the sample is. First, because the study is recruiting from a limited panel who have the technology, knowledge and time to sign up for push-notification studies, compounded by the fact that the sample will typically be pulled from an even smaller subset of this population, it might be impossible to actually recruit a sample that looks like your target population. Further, the process of programming on proprietary mobile platforms and scheduling push notifications on a participant-by-participant basis (among other additional logistics with the push method) added labor, time and cost.

However, one advantage to the push survey is the flexibility to carefully control send times such that each push can be explicitly scheduled on a participant-by-participant basis. To take advantage of this capability, each participant was screened to discover how likely it was that they would be watching video in the foreground (paying attention) throughout the 24 hours of a typical weekday (five-point scale). Separately they were asked the same question about watching video in the background. The resulting top two-box distributions (e.g., weekday/foreground in Figure 1) were used to find the exact proportion of push surveys that should be sent during "foreground" and "background" moments and to weigh the number of push notification sends by time of day. For example, the majority of viewing moments occur during prime time (7-10 p.m. local) while the fewest are between 12 and 4 a.m. Proportions of push notifications were

Figure 1

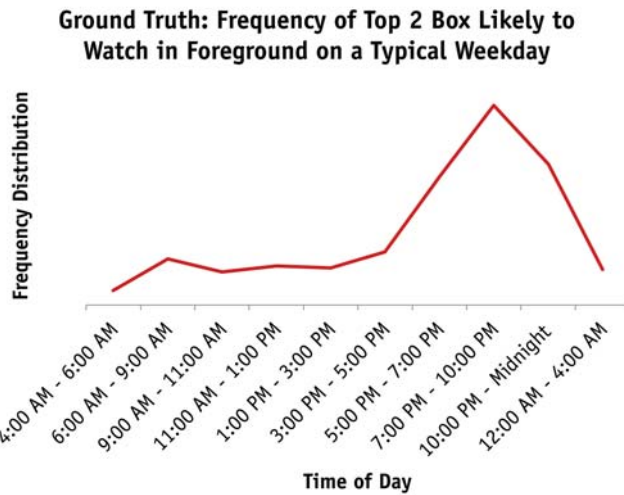
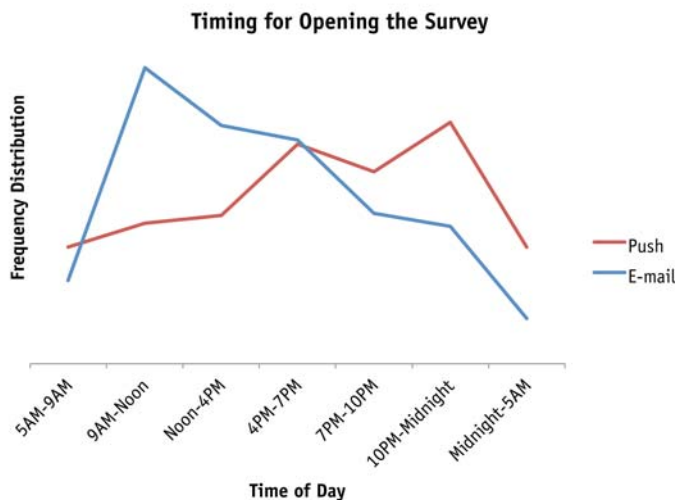


Figure 2



weighted accordingly. Each participant was then assigned a specific moment to receive the notification during which they had indicated they would be highly likely to be viewing something. These distributions also formed the testable ground truth.

Overall hypothesis

It was hypothesized that the push notification method would be superior to the e-mail survey method because it would capture participants' in-the-moment contexts more accurately than the e-mail survey. This would result in a reduction in the memory and observer biases mentioned above and, therefore, yield results that were more representative of the variety of actual moment

of choice. This would, however, not come without a significant investment both in time and money. To explore this overarching hypothesis, a number of specific hypotheses were tested, three of which are discussed below.

Because the e-mail method will not capture participants in the moment as accurately as the push notification method, it is hypothesized that:

1. The time difference between the survey being opened and the moment of choice recorded will increase.
2. Recorded moments will overindex during times of day when personal e-mail tends to be more frequently checked (e.g., first thing in the morning before work).
3. The variety of recorded mo-

ments will be reduced – participants will tend to recall the move obvious or aspirational viewing moments (e.g., watching in the living room, foreground viewing) over the less obvious, less thoughtful viewing moments (e.g., watching a TV at a bar, background viewing while doing chores).

Results

Testing Hypothesis 1: The correlation between send time and the time the survey was opened was significantly higher in the push survey, from $r=.20$ (e-mail) to $r=.34$ (push) (these numbers would both be higher but the survey was unable to track in local time). The e-mail survey was most commonly opened first thing in the morning (Figure 2), either at work or at home, and the push survey was opened at regular intervals throughout the day.

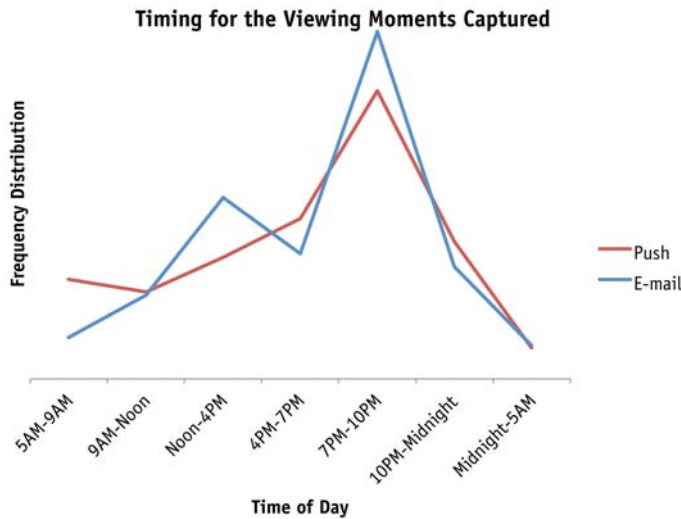
Testing Hypothesis 2: There were significant bumps in viewing moments captured by the e-mail survey in the middle of the day and immediately after work into prime time (Figure 3) while the push survey is a more accurate match to the known distribution of viewing (e.g., Figure 1). The push curve is also much closer to the typical weekday viewing curve from internal data.

Testing Hypothesis 3: For the purposes of this article, we are only displaying one metric used to test Hypothesis 3: foreground vs. background viewing. There were almost equal amounts of foreground and background viewing in the e-mail method (Figure 4a) while there was more background viewing in the push method (Figure 4b).

Discussion

The primary goal was to capture the actual viewing moment, reduce memory and observer bias and, therefore, improve the validity of the overall survey responses. To this end, it was concluded that the push-notification method was superior to the e-mail method. The push survey was opened closer to the target send time, resulted in viewing proportions that were more similar to the ground truth and curbed an overincidence of the most common, stereotypical or aspirational viewing moments. In addition, the concerns about a sampling from a representative population were alleviated when

Figure 3



it was found that the typical weekday view curve (Figure 3) matches internal data on playstarts more so than the e-mail data. Going forward, despite the added time, complexity and costs, it is concluded that a push-notification method would be recommended for any researcher looking to test a number of hypotheses on a massive, national scale where unobtrusive ethnographies might be seen as the gold standard.

In order to determine if a push method might be the best approach for you, ask yourself these questions:

- Are the answers to your survey context-dependent or context-agnostic?
- Are you trying to capture variables that might change across time of day or location?

- Do you believe that the device context might artificially influence responses?

- Are you concerned that participants might ignore something they do as “insignificant” or “unimportant” that is actually critical for you to capture (e.g., watching TV at a bar)?

- Do you think participants might change their behavior simply because they know you are observing them?

If any of these seem like they might pertain to your research projects, consider moving away from an e-mail survey and toward something with a bit more control, ecological validity and reduced bias. ¹¹

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Figure 4a

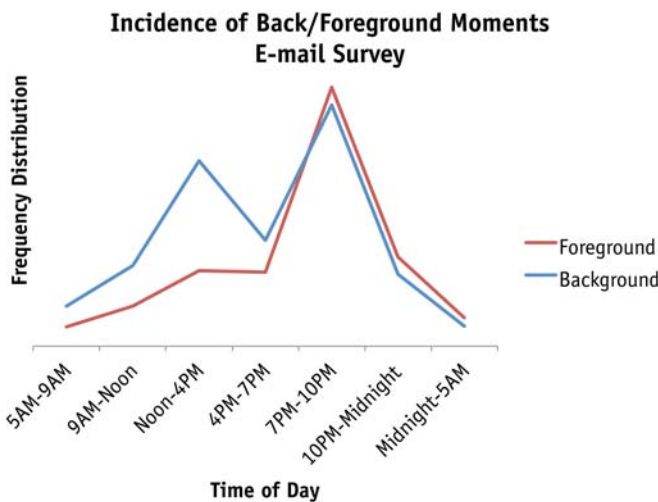
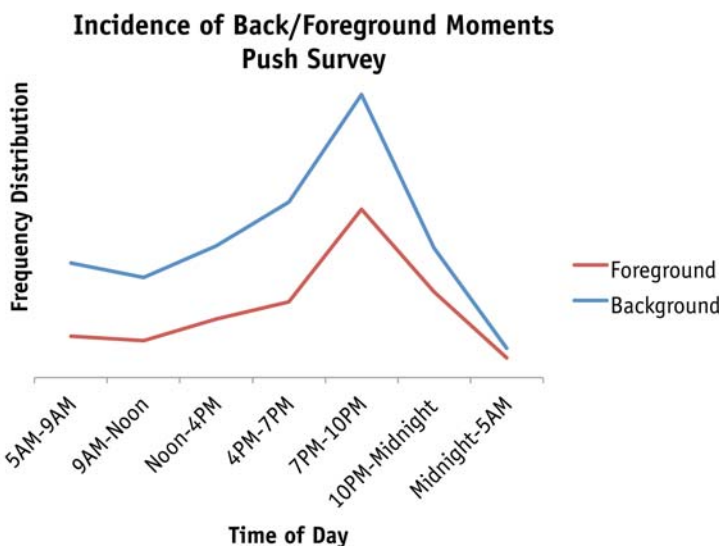


Figure 4b



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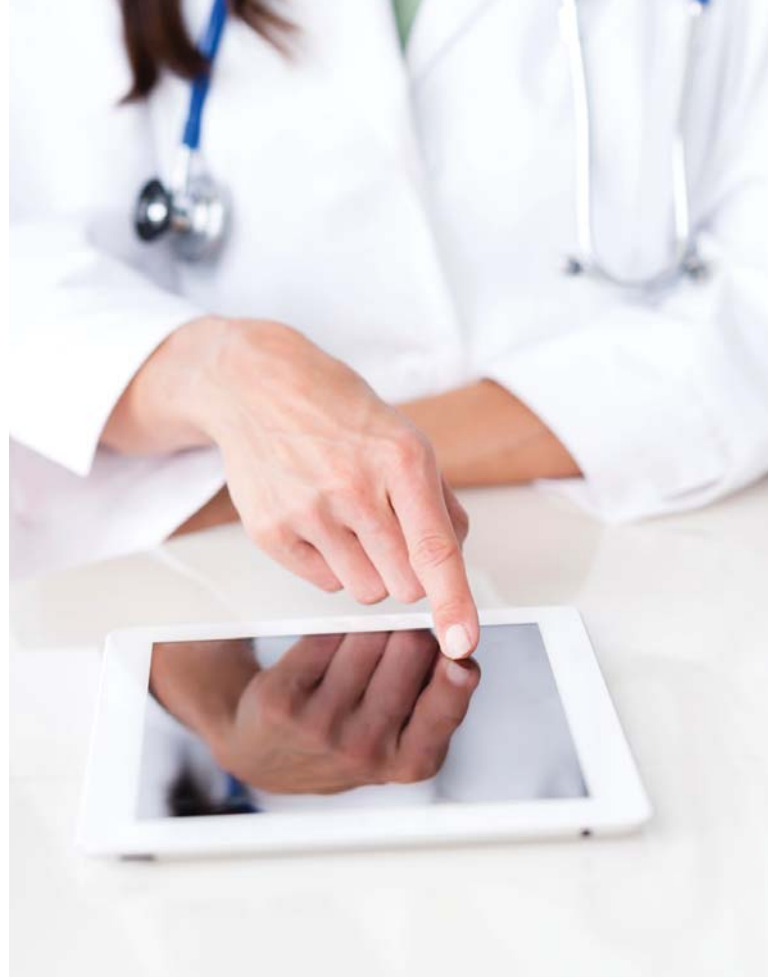
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●●● mobile research

Prescribed thinking

Conducting in-the-moment mobile research with physicians

| By Eelke Roos



snapshot

SKIM's Eelke Roos reports on using a mobile app to look at doctors' System 1 and System 2 thinking related to prescription-writing.

Have you ever wondered why people choose Coke over Pepsi or Bud Light over Coors Light? Or why two brands of pharmaceuticals with similar efficacy and safety measures are prescribed differently? The reasoning behind these types of decision outcomes is often more influenced by emotion than rational thinking.

While both are effective ways of processing information, feeling is more immediate. The interplay between rational and emotional decision-making reveals what actually happens at the tipping point – in this case, the point at which a prescription is written. One would expect physicians to rely primarily on hard facts and objective data but that is often not the case. In exploring how these decisions are really made, it is necessary to identify when and how rational and emotional processes come into play. And, compared to more traditional market research tools such as in-depth interviews in a research facility, mobile devices are superior research tools for revealing the true in-the-moment drivers behind prescribing decisions.

To understand why these developments in mobile research are of interest to health care market researchers, it is helpful to understand groundbreaking decision-making theories of the last few decades. In that time, we have gained a much richer understanding of decision-making thanks to pioneers like Nobel Laureate Daniel Kahneman. In 2002, Kahneman was the first psychologist to win the Nobel Memorial Prize in Economic Sciences. In 2011, he published his book *Thinking, Fast and Slow*, which advanced our understanding of decision-making. Kahneman explains why people sometimes make seemingly odd and irrational decisions and what may elicit these types of decisions.

The main driver behind Kahneman's theory of decision-making is his observation that decisions can be heavily influenced by emotions and don't always follow the rules of rational thinking. Kahneman is regarded as a pioneer in this new age of understanding decision behavior and is recognized as the father of behavioral economics. His



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System 1	System 2
The answer to $2 + 2 = ?$	The answer to $23 \times 47 = ?$
Detect that one object is more distant than another	Fill out a tax form
Complete the phrase "bread and...."	Complete a complex market research survey
Read words on large billboards	Focus on the voice of a particular person in a noisy and crowded room
Drive a car on an empty road	Park in narrow space
Orient to the source of a sudden sound	Count the occurrences of the letter "a" in a piece of text
Understand simple sentences	Brace for the starter gun in a race

theories are important to market researchers as they offer an appealing explanation for why customer choices cannot always be predicted using rationalized models and why certain brands do better than others even though they don't necessarily provide better products.

Kahneman divides thought processes into what he calls System 1 and System 2, or the "dual-process" model of the brain. System 1 is fast, intuitive and emotional, can't be switched off and is the "secret author of many of the choices and judgments we make. System 2 is slower, more deliberative and more logical.

In order to better understand these two different modes of thinking, consider the following small exercise involving two different calculations.

Here is the first calculation:

$$2 + 2 = ?$$

It is not difficult to automatically arrive at the answer: 4. The answer comes easily and requires minimal cognitive strain. This is System 1 at work. Another term for System 1 is "intuition."

Now, let's perform another calculation. Please take a minute to do it (pencil and paper are allowed): $23 \times 47 = ?$

This time it was not as easy to come up with the answer. When doing the calculation, you most likely experienced cognitive strain and an answer did not come to mind immediately. If we monitored your biological functions, we would have seen that your heart rate and blood pressure went up, your pupils became dilated and your sweat glands were activated. This is your System 2 at work.

When asked if 198,459 is a pos-

sible answer, your System 1 thinking (intuition) would intuitively tell you no. It would also tell you that the answer is most likely not 156. However, System 1 does not have an exact answer to this problem readily available. It would also not know if 1,231 is the correct answer, were it given as an option. In order to get to the answer, you needed to switch on your System 2 thinking and exert some effort to figure out that the answer is 1,081. (One can explore this theory further by visiting www.theinvisiblegorilla.com/videos.html. Follow the instructions faithfully to discover how System 2 takes over, rather unwillingly, when things get difficult.)

The table shows a list of various types of decisions that are characteristic to both System 1 and System 2.

System 2 is thought to be quite lazy and only comes into play when we need to make a difficult decision. System 1, by contrast, is automatic and unconscious and hums along continuously in the background. It constantly surveys the environment and processes the incoming stimuli with high speed.

Because System 2 is lazy, you instinctively try to make decisions with System 1.

Interestingly, through practice, humans can convert System 2 activities to become System 1 activities. While a game of chess requires great concentration for a chess player with average skills, seasoned chess masters make their potential moves almost automatically and do not experience the same cognitive strain. For chess masters like Garry Kasparov, a standard game of chess is more a System 1 activity than a System 2 activity.

Tips for conducting in-the-moment mobile research with physicians

While mobile research with physicians is a great way to understand the truth behind a prescribing decision, there are challenges when working with this methodology. Here are three tips for overcoming those challenges.

Conduct a thorough briefing to avoid leaving questions unanswered. With in-the-moment mobile research, it is not possible to probe further with follow-up questions. This can be advantageous in understanding what is top-of-mind but it can also be a disadvantage as it may leave some questions unanswered. To avoid unanswered questions we recommend conducting a thorough briefing of the respondents on what to say and what not to say when recording a voice memo. If you are recruiting a large sample of physicians, a briefing video can be a cost- and time-effective method. However, to ensure a full understanding of the assignment, in addition to sending out the briefing video, we also conducted follow-up briefing calls.

Phase incentives to ensure respondents complete enough patient cases. When conducting in-the-moment mobile research with physicians there are two main dropoff points: 1) when installing the app on the physician's smartphone, and 2) during the patient case collection period. While many physicians are open to the idea of participating in the research, the installation process may be daunting to some. After the app is installed and physicians have submitted their first patient case, many will follow through and complete the research in its entirety. However, especially when looking for rare patient cases with very specific disease characteristics, physicians need to be reminded of the research goal and parameters. Failure to do so may lead to the physician simply forgetting to complete the survey app after seeing a suitable patient. For this reason it is advised to provide incentives in stages: at app installation; following completion of the first patient case; and after the desired number of cases has been submitted.

Be patient. In-the-moment mobile research studies with physicians can take long time. While most physicians own a smartphone, in-the-moment mobile research is still in its infancy and physicians are not familiar with this type of market research. Running the project can be labor-intensive, particularly when a large sample is required, due to the higher dropoff rate and the need for regular contact moments with respondents. Physicians are still accustomed to online surveys and in-depth interviews. In-the-moment mobile research is not an easy sell to everyone. That said, most physicians really enjoyed participating in the research and found the survey app easy to work with. For that reason, we are confident that in-the-moment mobile research will become an established technique in the future, among both pharmaceutical companies and physicians.

Prescribing drugs becomes an automated activity

So, which thinking mode influences physicians' decisions? During medical training, seeing patients and prescribing treatments is a strenuous activity that requires a great deal of concentration. However, more tenured physicians make a majority of their prescribing decisions seemingly effortlessly. Over time, prescribing drugs becomes an automated activity that is more driven by System 1 than System 2 thinking. System 2 is only activated in rare cases. In clear-cut patient cases, a physician immediately and

instinctively knows which drug to administer. With little cognitive effort, they are able to make a prescribing decision, similar to a chess master who relies on System 1 thinking to make his next move.

System 1 decisions are heavily influenced by emotions and often diverge from rational thinking. Kahneman describes many experiments in his book that prove that System 1 is not rational but emotional. If one can conclude that prescribing decisions are typically a System 1 activity, that means these decisions are heavily influenced by emotions. Therefore, if one tries to

obtain a deep understanding of the reasons behind a prescribing decision, System 1/System 2 theory tells us that researchers need to capture the emotional as well the rational part of the decision making process.

One challenge of measuring emotion (System 1 thinking) is that the emotion itself, and the recollection of the emotion, tends to dissipate quickly. Emotion has to be captured and measured quickly in order to maximize research results. Because of the time lag involved, research projects involving physicians are designed only to uncover the rational (System 2) aspects of

a decision and not the emotional aspects (System 1). For example, we often ask physicians to take patient forms to a research facility and explain why they made a particular treatment decision.

To get to the truth behind a prescribing decision and to understand the emotions that are often driving such a decision, it is important to conduct the measurement as close to the actual occurrence as possible. Without an understanding of the System 1 aspect, we only get a partial understanding of the drivers behind the decision. While measuring close to a point of action is more easily done with consumers (e.g., by following a person on a shopping trip), with physicians it is extremely challenging.

Emotions are still fresh

Since observing a physician while he or she makes a prescribing decision is usually not an option, mobile solutions are the next best thing to being there. While online surveys are traditionally completed using a desktop computer, a mobile device enables the respondent to complete a simple survey immediately after seeing the patient, when emotions (System 1) are still fresh.

In a recent case study, SKIM researchers conducted research for a brand team at a well-known pharmaceutical company with the following objectives: track the prescribing of oncology treatments over time along with patient characteristics driving the prescribing decision; understand why certain brands were being prescribed and not others.

There was a general feeling among the brand team that conventional research methods were too general and did not reveal the full story behind why certain brands were being preferred over others, therefore they were open to trying a novel methodology. For example, when physicians were invited to a research facility and asked to describe their reasoning regarding a particular prescribing decision, the responses were usually very clinical and devoid of insights regard-

ing any non-clinical or lifestyle-related feedback. Because the study featured agents that were very similar in efficacy and safety (virtually interchangeable, in fact), researchers felt there must be an extra layer of reasoning regarding the prescribing decision.

SKIM researchers deployed a mobile survey app that could be easily and quickly accessed by a physician directly following a patient consultation. The survey app was designed to take no longer than five minutes. By keeping the survey short, physicians could answer survey questions between consecutive patient consultations.

The survey app consisted of two main parts: 1) a voice memo during which respondents were asked to record their reasons behind the decision; and 2) short, closed questions (single-select, multiple-select and rank) to gather relevant patient data.

For the audio recording, the respondents were asked to share the following information: clinical history of the patient; summary of what was discussed during consultation; treatments considered by the respondent during consultation; treatment chosen and reasons why; and reasons for not choosing any of the other treatments.


During recruitment, respondents were thoroughly briefed on how to use the app and how to record the voice memo. They were advised to provide a certain depth of information as well as an approximate length of time to spend on each aspect of the voice memo. Because the research had a quantitative component, the required sample was relatively high, making a thorough briefing ever more important to ensure adequate participation.

Came prepared to challenge

At the conclusion of the study, researchers collected and analyzed more than 500 patient cases, including voice memos, from physicians in the U.S. and Europe. Since the patients were diagnosed with an oncologic disorder, the consensus was that treatment decisions were related to clinical outcomes and

patient characteristics. The mobile research revealed the extent to which patients were involved in treatment decisions. In many cases, a patient declined a treatment or came prepared to challenge the oncologist on his or her choice. While the team was aware that this sometimes happened, the high frequency of occurrences was a novel insight that warranted further research into what patients want and how to convey this information through DTC (U.S.) or sales reps.

Unlike in-depth interviews, follow-up questioning is not possible with in-the-moment mobile research. While this presents some limitations, in this case it led to a very actionable insight that directly influenced the brand's marketing strategy. We learned that the drug produced by the client company was not top-of-mind when discussing options with patients. Physicians very often presented multiple options to the patients (the frequency of this was an insight on its own) and discussed with the patient which drug to prescribe. Among the options often excluded was the client's drug. It was clear that the brand team needed to increase awareness of the drug.

Because researchers collected quantitative data on patient characteristics, they were able to create crosstabulations showing which drugs were prescribed to which patient types. The client drug in question was indicated for patients with very specific disease characteristics. The research revealed that the client drug was often not presented as a treatment option even though many of these patients were presented with multiple options and were engaged in the decision-making process. In addition to the much-needed increase in overall awareness, it was clear that an educational campaign was required to educate and remind physicians which patients are most suitable for treatment with the drug. 

Eelke Roos is a senior research manager at SKIM London. He can be reached at e.roos@skimgroup.com.



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| By Katrina Lerman



snapshot

Communispace
research examined
Millennials and their
views on personal
health and the health
care system and found
many of them feel like
they're on the outside
looking in.

The other night, I was taken aback when a haggard-looking Walgreens clerk handed me my change and told me to “Be well.” (Given that I had purchased only candy, I’d have been sure I misheard, but he said it to the customer in front of me as well.) Normally I’d roll my eyes at such a marketing gimmick but in light of my recent research, I couldn’t help but wonder if it signaled a deeper awareness among some brands of the pivoting priorities of today’s health care consumer.

Walgreens’ new new-agey farewell would seem to embrace the results of a recent multi-method study from Communispace that found an emerging set of health care values embodied by an increasingly wired, independent and self-reliant Millennial generation. Shaped by uncertain and challenging times, they resist following the traditional health care “rules” and, indeed, see wellness as equally important as health – opening up big opportunities for a wide range of brands to provide the support and tools younger consumers are looking for.

We deliberately chose to use multiple techniques, tools and samples to dig into this complex topic from as many angles as possible and to represent the voices of a range of Millennials. Millennials are a diverse generation, not just in demographics but – thanks to their constant connectivity and access to information – in experiences, attitudes and influences. We also knew that a range of interactive activities (all mobile-optimized, of course) would keep a Millennial audience engaged over the course of a three-month study.

To elicit personal stories, deep associations and interactive discussion, we explored health care topics with over 600 members (about half Millennial) of three private, branded online communities. Open-ended discussions asked members to share health care influences, past experiences and the various ways they use technology to manage their health. An EmotionCentric Explorer exercise uncovered deep emotions at the heart of health care decisions, while a metaphor-building exercise used images and storytelling to reveal strong associations with health care topics from insurance to providers. Finally, we had community members use a digital collaging tool to design their “health care app of the future.”



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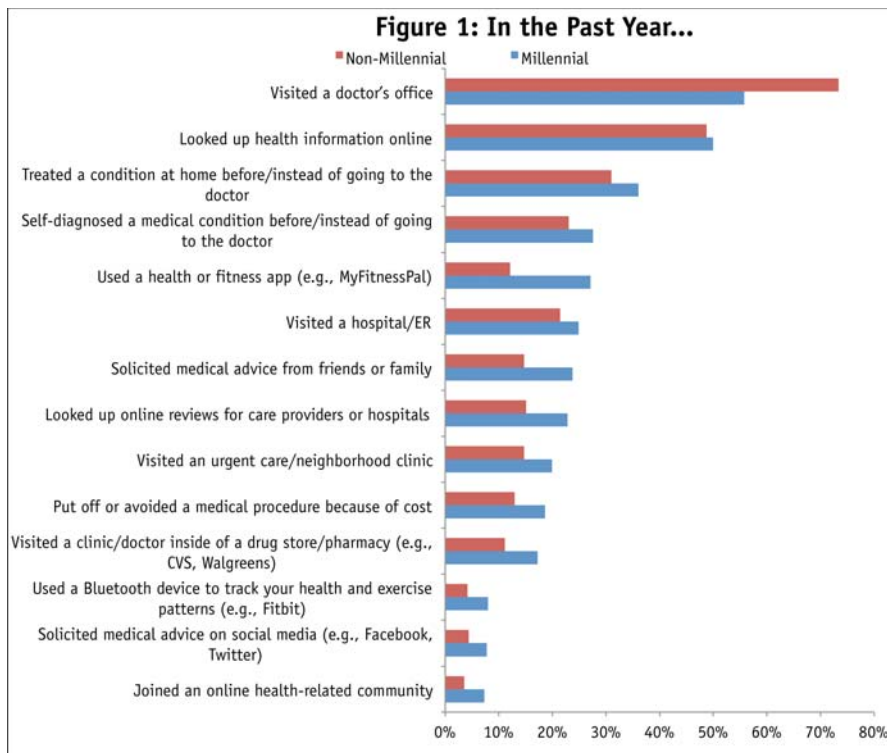
About midway through our community collaboration work, we fielded a survey to a separate, nationally-representative sample of 1,500 consumers (1,000 Millennials) from an online panel. These findings helped both to validate and quantify some of the themes we were hearing and to inform the rest of our community engagement.

Finally, we partnered with c2b Solutions, designer of the Consumer Classifier psychographic segmentation, a model that sorts health care consumers into one of five groups, each with its own motivations and preferences. This segmentation was administered to community and panel members and used as another lens through which to understand the diversity of Millennial health care consumers and how the unique characteristics of each group can help businesses connect with key segments.

Too much power

In our study, 37 percent of Millennials rated the current state of health care in America as “poor” or “terrible” and 49 percent said the government (symbolized by the Affordable Care Act, aka Obamacare) is most responsible for the problems with health care in America today. A full two-thirds of Millennials (and 71 percent of non-Millennials) believe that insurers have too much power and are often perceived as putting profits ahead of patients. Pharmaceutical companies are seen as greedy and deceptive, ranked as the least-trusted health care information source. Institutional-averse Millennials see the entire health care system as yet another dysfunctional collusion – and don’t see any of the major players as having incentive to change.

Regardless of their personal opinions about the ACA, most believe the law has done little to make our health care system simpler, cheaper, more efficient or better-prepared for the future. Millennials were slightly more positive than non-Millennials in their assessment of the ACA’s impact on themselves, those around them and the country as a whole, but when we really dug into their firsthand experiences, many had to admit that it was both good and bad. In other words, mixed reviews. The truth was, many knew people on both sides: those who had lower costs and expanded access to care



and those who’d seen their premiums rise and care options shrink.

Millennials are disproportionately affected by the ACA yet they are more likely than older adults to say they don’t know enough about the law. Indeed, many young people we talked to agreed that much of the law’s bad reputation stemmed from poor implementation and communication – in short, a marketing problem. Similarly, Millennials were more likely to express hope that the ACA could lead to positive changes in the future. One young man summed up the pragmatic Millennial point of view using a weather metaphor: “Lightning can seem like a violent, damaging act which causes fire and destruction but it is also the sign of storms and rain, which bring about growth. Same thing with the ACA. Different people can make you see different things about it.”

That said, Millennials have a complex relationship with insurance that long predates Obamacare. In many ways, health insurance epitomizes the tension between childhood and adulthood. It represents so much that’s scary about being an adult – responsibility, complexity, expense, life’s harsh realities – and Millennials don’t want to grow up. Even those who have insurance are often hesitant to use it, for fear of getting lost in a confusing maze of co-pays, deductibles and prior authorizations.

An Emotion Centric Explorer exercise emphasized the often-contradictory emotions (fear and security, shame and pride) associated with buying, having and using health insurance. Similarly, the image of an umbrella – traditionally used by insurance companies to represent protection and safety – elicited both the expected associations and surprisingly grim sentiments such as, “Thinking about insurance makes me sad and seems depressing. It makes me want to stay home and not deal with it, like a rainstorm makes me want to stay home.”

Outside the system

Their disillusionment with the current state of health care, driven by high costs, shortage of care and an aversion to large institutions, has pushed Millennials outside of the traditional system. They have become fiercely independent, relying on their personal networks, niche resources and a wide range of products, services and providers to manage their health.

As shown in Figure 1, just over half have visited a doctor’s office in the past year, compared to nearly three-quarters of non-Millennials. By contrast, Millennials are more likely to have utilized a range of care options, from urgent-care clinics to emergency rooms to home remedies. Much of the stigma around alternative health care facilities seems to be gone; indeed, almost

as many agree (31 percent) as disagree (33 percent) that care from a clinic is as good as that from a doctor's office.

Nearly a quarter say they've sought medical advice from friends and family in the past year and 53 percent consider them to be a trusted source of information. Parents were often referenced as a "first call" for Millennials with a health concern and friends and family in the medical field are an invaluable source of guidance. Millennials are also more likely than older adults to self-diagnose (28 percent) or treat at home (36 percent) before doing going to a doctor.

The Internet has undeniably become a top tool in Millennials' DIY health care arsenal, allowing them to learn from the experiences of experts and fellow patients alike as they research symptoms, conditions, treatments, providers and facilities. The idea that Millennials rely on "Dr. Google" is not an exaggeration but it's important to recognize that they are using Internet resources as both an alternative and a complement to traditional medical care – a way to prepare for going to the doctor or to avoid having to go as often.

The trend towards self-quantification, enabled by wearable devices and health apps, has also transformed the ability of patients to monitor and improve their own health. In our study, adoption rates among Millennials were still relatively low (27 percent app, 8 percent wearable) but far outpaced older generations (12 percent, 4 percent). When we asked what they'd like to see from their tech-health tools in the future, the central theme was towards centralization – on both a private level, aggregating an individual or family's medical data in a single, secure location; and a public level, integrating self-generated health data with a range of providers, insurers, brands and the larger electronic health record system.

Research has shown that younger consumers are increasingly willing to share all types of personal data, even as they fear the risks of fraud and discrimination.² The potential for added convenience, personalization and incentives is simply too tempting. For savvy companies that can provide needed support outside the traditional system, the exchange of health data has huge

potential to connect consumers more deeply to brands, products and services and help drive desired (consumer- or brand-intended) behavior change.

Less consensus around future-focused behaviors

Millennials are known for their YOLO ("you only live once") attitude and this is generally true of their health care behaviors as well. While consumers across generations agreed on the importance of daily stay-healthy steps like drinking enough water, getting enough sleep and exercising, there was less consensus around future-focused behaviors (Figure 2). Perhaps surprisingly, less than half of Millennials consider getting regular medical (44 percent) and dental (45 percent) checkups or having health insurance (46 percent) to be part of maintaining their overall health and wellness; nor are they too interested in getting vaccinations (39 percent), performing routine self-exams (32 percent) or getting routine cancer screenings (23 percent).

Sure, Millennials as a group are young and healthy, so of course they're not too worried about the future, right?

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Figure 2: Part of Maintaining Health & Wellness?



Yes, the invincibility of youth certainly explains some of the generational differences we found. But looking at some of the other behaviors on our list, we saw that Millennials really do have a different, broader definition of what it means to be healthy and well. They view their health more holistically, trying to maintain balance on a spectrum from sick to well and in terms of small, everyday choices, not just the big ones.

For example, nearly half of Millennials consider maintaining a work/life balance (49 percent) and relationships with friends and family (47 percent) to be part of their health and wellness. Note that these are larger proportions than those of any of the above institution-centric behaviors. More than a quarter say organic, natural and non-toxic products are part of maintaining their health and may see them as alternatives to traditional medicine, signaling an opportunity for brands well beyond the traditional health care sectors.

Millennials have been dubbed the “most stressed” generation in history,³ so it’s no surprise that they recognize the importance of relaxation and mental health in maintaining long-term health; in fact, 55 percent agree that a healthy mind leads to a healthy body, not the other way around. As a result, they are more likely than non-Millennials to consider unplugging from technology, meditation, massage and talk therapy to be elements of staying well.

Wellness to Millennials is about more than not getting sick; it’s about all facets of life and in particular, how they are connected – from maintaining balance to controlling stress to cultivating positive experiences and relationships. Health care often feels like a gamble, cloaked in uncertainty and chance (i.e., even if you follow all the rules, you can still lose big), so instead of planning for the future, Millennials often focus on those things they can control today.

Health care without borders


For Millennials, health care is not a separate sphere, financially, emotionally or physically; it’s not about what happens at the doctor’s office, it’s happening all the time, everywhere. It’s happening in a discussion with a coworker over coffee, a Google search on the train, a lunchtime yoga class, a farmer’s market or an abuse survivor’s support group. It’s health care without borders.

The fundamental locus of control in health care has shifted from providers and big businesses to the consumer. Political and financial changes to the health care system have put patient outcomes front and center and behavior change is the name of the game. At the same time, competing financial pressures mean Millennials make direct trade-offs between health care spending and other purchases, leading them far outside the traditional system of care in an attempt to cut costs. Brands must

meet consumers where they are to have a chance at truly moving our health care system from treatment to prevention.

Embracing the Millennial mindset of institutional aversion and self-reliance means not dictating the “right” way to stay healthy. It means connecting self-reliant consumers with the resources, knowledge and tools to make better health care decisions and gently steering them towards treatment when needed. It means understanding the needs and motivations of diverse groups of health care consumers and keeping an open dialogue to understand ever-shifting priorities. And, for brands across other sectors, it means expanding their view of what health and wellness means and asking what their organization can do to support Millennials as they manage healthy lifestyles.

Though just one of many, Walgreens is a great example of a brand embracing Millennial health care values through its products and services. The shift in customer-greeting protocol is very much in line with its other moves aimed to transform the drugstore chain into a full-fledged health care partner. Not only does it offer flu shots and physician consultations in-store (a practice now commonplace among drug, grocery and big-box retailers), but its Balance Rewards program allows customers to earn in-store credit – not just for Walgreens purchases but by sharing personal health and fitness data. This data can then be used to personalize messaging, offers, services and rewards to individual customers, further motivating behavior change and, naturally, strengthening their bond with the brand in the process.

Be well, indeed. 

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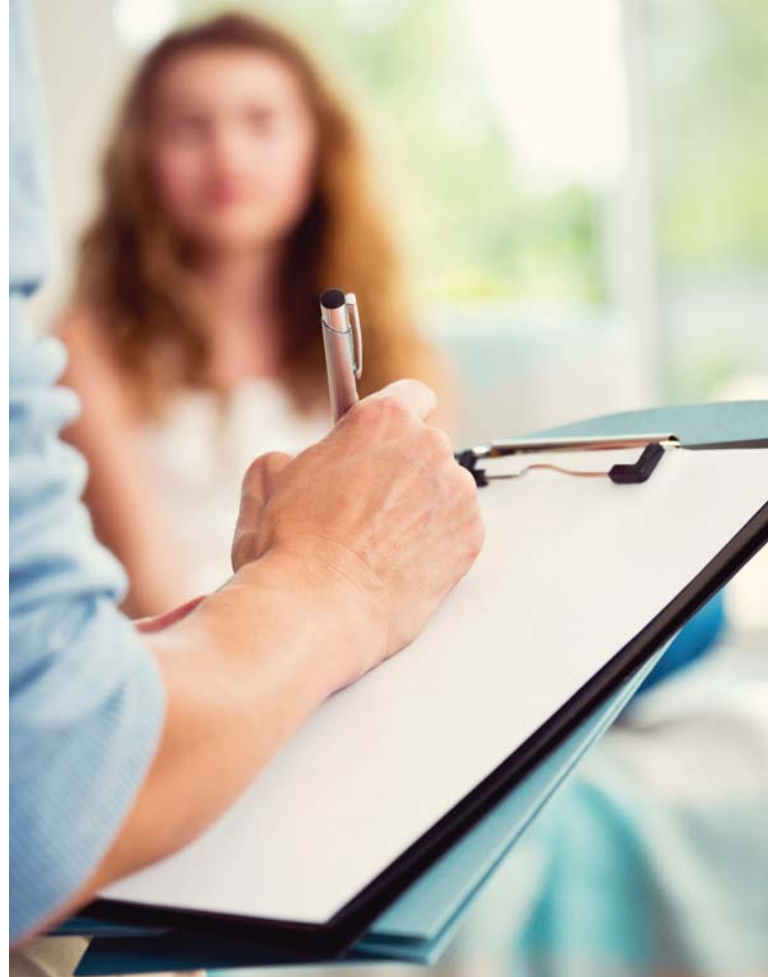
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Let me tell you about me

Qualitative approach aims to have Millennials dig deep

| By Susana La Luz-Hawkins



snapshot

Researchers at Lextant looked at Millennials using a qualitative, participatory approach designed to reveal emotional insights that define what drives this generation and uncover their hopes and aspirations.

When you spend time with people, listening to what they think and how they feel, you can get rich, meaningful insights into what makes them tick. To be able to help our clients better understand Millennials, we wanted to take a more personal, emotional approach and look at Millennials through their own eyes.

Lextant conducted qualitative research, using its Connect.Dream.Create methodology, with 27 participants aged 20-30 in Columbus, Ohio. Participants were at varying stages of life, from students to parents and professionals. This methodology is designed to allow participants to become more conscious of current experiences and uses a stimulus-language that allows them to express desired experiences and the characteristic attributes of made objects and services that would deliver on those aspirations. The goal is to take participants on a self-expressive journey, while allowing analysis of the entire sample for commonalities.

Participants were asked to keep a journal of meaningful, current “work,” “live” and “play” experiences. These life moments were captured using online tools over several weeks and served as a springboard from which respondents could articulate desired experiences during a one-on-one interview. Using a stimulus set of words and images to allow participants to express desired experiences, this co-creation approach is based in projective psychology, allowing participants to tap into and express their emotional desires and aspirations. As a foundation, it was first important to understand life-level drivers. These exercises enabled deeper articulation of what fundamentally motivates the desires of young people.

After gaining a solid grounding in current experiences and a clear understanding of desires and aspirations, we then wanted to enable participants to connect their desires to the kinds of experiences they want to have in life. Using a stimulus-language comprised of words and images, respondents could express at a high level the ideal characteristics or attributes of designed experiences that surround them in everyday life.

After normalizing the data and finding the high-frequency and co-occurring patterns, we



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were able to develop an ideal experience model. As a life-level study, this model provides a framework that can be operationalized in any industry to develop of specific products and services resonant with Millennials.

Our focus was on understanding Millennials as they see themselves, without comparing them to other generations. Millennials have many things in common with other generations, however, as you compare insights in this article to what we know about other generations, you will spot aspects that make Millennials special and unique.

Our analysis identified “feeling extraordinary” as the heart of the Millennials generation. Surrounding the core are three main drivers in life: “live,” “love” and “do.” Seven key values support the drivers and are brought to life through Millennial attitudes and behaviors: enjoyment, independence, discovery, giving to others, meaningful relationships, accomplishment and involvement. At the base of the framework are four enablers necessary to maintain the Millennial values: money, health, time and technology.

I want to feel extraordinary

No matter what Millennials are doing, they want to stand out and be admired. When people listen to them and show appreciation for their contributions, they feel respected and like they matter. Millennials want to feel extraordinary in everything that they live, love and do.

I want to live

Living is about embracing new experiences and having fun as often as possible. Not only do Millennials want to feel smart, they want to be smart. They want to experience everything life has to offer firsthand, to truly develop their own authentic perspective. Millennials strive for independence; they seek to break away from conformity and engage in creative self-expression.

I value enjoyment

I go on adventures. I’m always looking for ways to break out of my typical routine. I never want to feel trapped or like I’m tied down to a schedule. I crave bold, new experi-

ences. I want to see the world.

I seek excitement. I crave exhilaration and seek out high-energy activities for stimulation.

I do fun stuff. Whether I’m by myself or with others, it’s always nice to do something just for the fun of it. I find ways to leisurely entertain myself.

I hang out. There’s always something going on in my social life and I love taking time to just be with my friends. It doesn’t have to be anything special.

I express myself. I want to express myself through things such as art, music and cooking. I enjoy things that give me the opportunity to think outside the box.

However, today ... fun can be expensive and sometimes it doesn’t work for my budget and I often feel forced into a routine, especially when it comes to my job.

I value independence

I do what I want. I am independent. I have the freedom to make my own decisions without relying on anyone else. I want to be self-sufficient and financially independent so I can do anything I want.

I think for myself. I am unique and authentic. I have my own opinions and seek out firsthand experiences so I can bring my own perspective, rather than just following the crowd. I am original.

However, today ... my funds are limited and I feel like no one is listening.

I value discovery

I seek out new experiences. Any new experience is an opportunity to learn and grow. I want to learn from others, try new things so I can broaden my thinking and keep life from getting boring. Technology is an exciting part of this.

I never stop learning. Learning is something I truly enjoy. I want to continually expand my education and increase my overall awareness because it’s important to me to feel and be smart. Personal growth enhances my well-being. I want to know what’s going on.

I embrace challenges. It’s important to put myself in unfamiliar situations because it helps me grow; overcoming challenges is incredibly fulfilling. I

want to be pushed out of my comfort zone, both physically and emotionally.

However today ... technology can also be overwhelming and hard to keep up with. At times, it can be too much.

I want to love

Millennials make time for others – to socialize, build relationships and make a difference in their community. They prioritize spending time with the people closest to them to create shared memories and surround themselves with a loving support system. For Millennials, life experiences aren’t worth very much if they can’t be shared.

I value giving to others

I contribute. It’s important to be involved so I can make a positive difference in my community, society and even the world. I’m generous with my time and give what I can to help others. It’s important to give back.

I nurture. I want to have a positive impact on the people I love by providing for them and doing things to make them happy. I was meant to be a parent and want to be there for my loved ones, no matter what.

I mentor. Being a leader and giving my time lets me help others succeed and be the best they can possibly be. I give my time to help teach and coach kids and help others find their way.

I value meaningful relationships

I share experiences. Making time to be with others strengthens my relationship with them and creates memories that will last a lifetime. It’s important that I make the time to connect with my partner and my kids. I prioritize social activities.

I stay in touch. It’s important for me to stay connected with my friends and family, no matter where our lives may take us. I use technology to stay connected.

However, today ... It’s hard to find the time. I worry about losing face-to-face interactions. I feel like I have no privacy and am concerned that my personal information is at risk.

I want to do

Millennials strive to excel and they want to know that their hard work will have a significant impact. They

set goals, take action, make connections and let their voices be heard. Ultimately, they want to be a person that provides guidance, leadership and expertise.

I value accomplishment

I'm productive. It's important to stay on top of everything I have to do and get it all done efficiently and effectively. I'm organized and leverage technology. I also value collaboration. Teamwork and communication keeps everything moving forward.

I plan. Having a goal to work towards and a clear vision of what's ahead helps me avoid getting off track. I'm right where I should be.

I create. I like to design, create and build things for myself and others.

I work hard. I feel proud when I know I put in my best effort. It means so much more when I know I earned my success. Hard work pays off.

I develop my skills. It's important that I continue to learn and gain experience wherever I can. Investing in my education was never optional.

I network. I make an effort to meet as many new people and make connections whenever I can.

However today ... I feel impatient, like I'm not reaching my goals as quickly as expected and I worry that I won't be able to live up to expectations.

I value involvement

I lead. I want to be someone others look up to as a respected professional within my field. I'll establish credibility by gaining trust and being responsible.

I problem-solve and come up with creative solutions. It excites me to think about investigating an issue. I want to be someone who can figure things out, especially when it comes to my professional life or helping others.

Enabling factors

In order to be able to live the lives they want to live, Millennials realize there are several enabling factors that need to be in place: money, health, time and technology.

Money to enjoy today and in the future. Millennials don't want to have to worry about having enough money. They don't need to be rich; they just want to make sure that they have enough to secure their financial

future and still do all the things they love to do today.

I save my money. I know my money will grow over time once I start saving. It's important to me to set myself up for success and financial stability in the future so I don't have to worry about having enough.

I'm savvy with my spending. I don't always have a lot of extra money to spend, so I try to find creative ways to do more using less money, rather than sacrifice the things I want to do.

However today ... I feel pressure to maintain a certain lifestyle. I often worry about my financial future. I want to be saving right now but I have so much debt that there's not much left over. I barely make ends meet.

Health to keep doing what they love. Millennials know that they need to take care of themselves, so they make a conscious effort to care for both their physical and mental health. It's important to their overall well-being but will allow them to keep doing the things they love.

I stay fit. I try to stay conscious of what I eat and how often I work out because it's important to me to stay in shape and keep active and have fun while doing it.

I take the time to de-stress. It's important to take time for myself so I can be focused, clearheaded and ready to take on whatever comes next. I spend time with others, try and get outdoors and focus on doing what I love and try to let the little things go.

However today ... I am overwhelmed. Dealing with money issues is mentally exhausting and drains my energy.

Time to balance it all. Millennials want to be better at managing their time. They believe that both their professional and personal lives are critical to their overall happiness, so it's really important for them to find a way to devote the right amount of time to each, without sacrificing.

I manage my time. I want to do everything and still be able to relax. It's important that I try to find balance between my work and personal life, so I can do everything without losing my mind.

I make time for socializing. Even though I'm busy, I try to make an effort to keep up with my social life because

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Millennials: a primer

Brand loyalty is declining. Millennials are more willing to buy from lesser-known brands. This could be due to the need to balance spending with lower incomes, their desire for new experiences and/or wanting to support “maker” culture. This can be seen in the declining performance of certain fashion brands and in the influx of small start-up or boutique brands.

Ownership is not an aspiration. Millennials seem to subscribe quickly to sharing, borrowing and renting when available. Their “collective” mind-set sees value in using something only for the period of time when they want or need it – and allowing others to share in its use. This can be seen in the widespread use of services like Craigslist, Spotify, community gardens and even shared living spaces.

Suburbs are out. Urban is in. Millennials see cities as prime places for discovery, exploration and socialization. As a result of this, they seem to gravitate towards living in or nearby larger, urban areas. Within these cities they seek out environments, neighborhoods and even virtual communities that fit within their value system and within their budgets. This can be seen in the development of abandoned warehouse or industrial spaces for socialization and creative events and in the upscale boutiques and restaurants cropping up in unlikely areas of town.

Passion for work-life integration. Whether they are making a living from something they are personally passionate about or integrating the things that they are passionate about into their professional lives, Millennials want work-life integration. This blend of professional and personal can be seen in the development of workplace communities and online entrepreneurial services. For example, Web sites like Kickstarter and Etsy allow people to showcase and make money from projects that they are passionate about.

Living healthy is cool. Millennials may be the first generation to combine enjoyment with healthy behaviors. They are making exercise fun, demanding food that is both nutritious and delicious and making conscious efforts to stay stress-free. This can be seen in the popularity of organic foods, health-related sporting events, the gamification of health goals and the surge of exercise studios that focus on both mental and physical well-being.

Technology is not the future. While the latest technology is aspirational, exciting and seen as a necessity, Millennials develop more meaningful relationships with experiences that are real time, hands-on, even analog. This could have huge implications for brands that want to connect emotionally with this generation.

Transportation is being redefined. For Millennials, transportation is key to new experiences, independence and productivity. While it is possible that they may value transportation more than any other generation historically, they also do not equate transportation with owning a car. Services like car-sharing and bike-sharing are cropping up quickly across the country, giving Millennials flexible and cost-effective solutions for their transportation needs.

having fun is just as important as work.

However today ... Achieving balance is easier said than done and I usually end up putting myself last. I feel overworked and burned out. My social life is suffering because I feel like I'm always “on the clock.”


Technology to keep them connected. Technology is integrated into almost every aspect of Millennials' lives. Although they couldn't live without it, they try not to rely on it too much because it can become overwhelming, distracting and even a little scary.

I keep up with what's new. Technology is constantly offering new and exciting ways to do things and I want to be on the cutting edge.

I use the right tools and resources. It's important that I find and use the right resources to help me stay up-to-date and on top of my work.

However today ... Keeping up with technology is expensive and it can be confusing and time-consuming. I feel like there are too many screens and it's easy to get sucked into wasting hours on meaningless distractions.

Sheds a different light

We hope this research sheds a different light on the Millennial generation and allows people to embrace them with hopeful optimism. Understanding Millennials will help to inspire the innovation that will attract and retain Millennials as consumers, community members and employees. 

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DRIVING VALUE THROUGH DATA AND THE EVOLVING ROLE OF RESEARCH

REBECCA ZOGBI, Vice President, Global Consumer & Business Insights, Dunkin' Brands Group, Inc.

The proliferation of data now available means companies must think creatively in terms of how to unleash analytical power across different teams and functions. Researchers and data scientists must identify innovative ways to combine data sources. A successful strategy must produce meaningful insights that drive business results. In this session, you will learn how Dunkin' Brands is proactively using resources and sharing data across the organization to drive business and customer engagement.

NEW!

dunkin'
brands

ZOGBI



NEW!

THE NEW SIGHT, SOUND AND MOTION: THE IMPORTANCE OF UNDERSTANDING VIDEO AS ITS OWN MEDIUM

MONICA PLAZA, Head of Sales & Business Development, Google Consumer Surveys

Google consumer surveys

The global growth of video, both as a creative medium and advertising platform, is explosive. Globally, we anticipate a 33% growth rate in video ad spending. But how much do we know about video as its own medium? We know it's not TV and yet it's often treated the same. How should we as market researchers respond to this? Can new, real-time research help us understand what sets video apart?

NEW!

THE ROLE OF RESEARCH IN AN INNOVATION-DRIVEN CORPORATE CULTURE

LAUREN DERALEAU, Sr. Research Manager, Customer Insights, Groupon

"Innovate or die"...and first to market wins. Right? What's the role of research in a fast-moving, innovation-driven corporate culture? Hear how the Groupon Customer Insights team balances the standard researcher mantra "Wait, let's assess" with the entrepreneurial spirit of "Go go go!"

GROUPON

GETTING COMFORTABLE WITH MOBILE GAMES FOR MARKET RESEARCH: A CASE STUDY INVOLVING MOVIES

JOE MARKS, Founder, Upfront Analytics

COMPARING APPLES TO POMMES: UNDERSTANDING AND ACCOUNTING FOR CULTURAL BIAS IN GLOBAL RESEARCH

CONOR WILCOCK, Research Director, B2B International

SONOCO DELIVERS PURPOSE-DRIVEN INNOVATION TO TRIBE HUMMUS

ALICIA RUDICK, Insights Manager, Sonoco

MOUTH BEHAVIOR – A NEW DISCOVERY THAT CHANGES PRODUCT COMMUNICATION STRATEGY

JENNIFER VAHALIK, Director, Products Research Technologies, U&I Collaboration LLC

LEVERAGING METAPHOR TO DETERMINE WHAT WOMEN REALLY WANT FROM HEALTH CARE USING REVELATION'S DIGITAL IMMERSION PLATFORM

SANDRA BAUMAN, PH.D., Principal and Founder, Bauman Research & Consulting
MARY AVILES, Consultant, Bauman Research & Consulting

NEW!

THE PERILS OF INNOVATION – A PANEL DISCUSSION

MODERATOR: JOE RYDHOLM, *Editor, Quirk's Marketing Research Review*
ERIC WHIPKEY, *Navy Federal Credit Union*
COLEEN AKERS, *Capital One*
STEVEN COOLEY, *Ph.D., Blue Cross and Blue Shield*
JEFF BARRY, *Nestlé Purina*

QUIRK'S

The research and insights industry is awash with talk of innovation. "Innovate or die" say its proponents. But surveys conducted by Quirk's and other organizations indicate that client-side researchers aren't necessarily sold on the value of innovating for its own sake. Against this backdrop, how should researchers think about innovation? What are its pros and cons? Are there ways to incorporate novel approaches to insights-gathering without sacrificing your credibility with internal clients and audiences? Join Quirk's Editor Joe Rydholm and a panel of researchers as they address these and other topics related to innovation in MR.



RYDHOLM

EIGHT KEYS TO GETTING BETTER DATA FROM QUESTIONNAIRES
DAVID HARRIS, *Founder and President, Insight & Measurement, LLC*

BRINGING EYE TRACKING TO THE STORE, THE WEB AND THE SMARTPHONE: UNDERSTANDING THE MOBILE SHOPPING EXPERIENCE
SCOTT YOUNG, *President, Perception Research Services (PRS)*

BREAKING BARRIERS – COMBINING INNOVATION, RESEARCH AND CUSTOMER COMMUNITIES
PAUL JANOWITZ, *CEO, icanmakeitbetter*
BARRY JENNINGS, *Head of Market Research and Competitive Intelligence, BlackBerry*

MINDMATCH: USING RESEARCH AND BIG DATA TO OPTIMIZE DIGITAL
DEBBIE SOLOMON, *Managing Director, Marketing Science, Mindshare*

HACKING INSIGHTS AT PEPSICO
STEFANIA GVILLO, *Vice President of Consumer Insights, PepsiCo*
MARCUS JIMÉNEZ, *Founder and CEO, StickyDocs*

FIRE THE MODERATOR! WHY YOU DON'T "HAVE TO BE THERE." TECH-DRIVEN SELF-ETHNOGRAPHY
KATHY DOYLE, *President, Doyle Research Associates, Inc.*

FOSTERING CREATIVITY THROUGH CO-CREATION
LINDA URY GREENBERG, *Director for Marketing Research, Columbia University*
KEVIN LONNIE, *President/Founder, KL Communications*

HOW CLIENTS AND VENDORS CAN GET THE MOST OUT OF WORKING WITH EACH OTHER
NAOMI HENDERSON, *CEO, RIVA Market Research & Training Institute*

STORIES FROM THE LEADING EDGE OF MOBILE: WHAT'S WORKING (AND NOT!) FOR ADVANCED MOBILE RESEARCH
SCOTT WORTHGE, *Vice President, uSamp*

NEW IPAD QUAL/QUANT SYSTEM PROPELS INNOVATION SUCCESS
JEFF GOLDSTEIN, *President, AcuPOLL Precision Research, Inc.*
ERICCA DENNEHY, *Vice President, Account Management, AcuPOLL Precision Research, Inc.*
BETH LUTZ, *Director of Account Management and Innovation, AcuPOLL Precision Research, Inc.*

SAYING GOODBYE TO SILOS: A CASE STUDY WITH YUGOV AND SCHOLASTIC ON MAXIMIZING RETURN ON RESEARCH DOLLARS

ANNE SPARKMAN, *Manager, Corporate Communications, Scholastic*
KRISTEN HARMELING, *Partner, YouGov*

Scholastic, the largest publisher and distributor of children's books in the world, and YouGov, the international market research firm, recently released the fifth edition of the Kids & Family Reading Report, among 2,500 parents and kids. This body of work rejects the silo mentality that prompts many research dollars to be spent EITHER for corporate communications/public relations purposes OR strategic business growth. Instead, the project elevates research to enhance corporate reputation and promote corporate vision and goals while fueling innovation across business units to drive growth. Scholastic's Anne Sparkman and YouGov's Kristen Harmeling will discuss how a spirit of collaboration, a cohesive organizational vision and research goals and methodologies that match that vision work together to create an end product – including research reporting, digital downloads, Web design, press outreach, app development and more – that benefits a multitude of stakeholders.



NEW!

IMPLEMENTING A MARKET RESEARCH DASHBOARD

TOM SCHLAK, *Dashboard Team Leader, E-Tabs*
ANDREW DALGLISH, *Director, Circle Research*

Dashboards are becoming increasingly popular as a means of presenting market research findings. This presentation will explore why and, via a case study, outline what agencies need to be aware of when offering a dashboard solution. We will examine what happens from conception and design to build and final delivery, highlighting challenges encountered along the way.



SCHLAK



DALGLISH



NEW!

CUSTOMER PULSE: INTRODUCING AGILITY INTO TRADITIONAL RESEARCH

JELENA KNOWLES, *Senior Market Research Manager, UCB Pharma*
BEV LEYMON PORTER, *Associate Director of Marketing Sciences, UCB Pharma*
ED MAROON, *Senior Vice President, MarketVision Research*

B2B ONLINE COMMUNITIES: ENGAGING MEMBERS AND YOUR OWN ORGANIZATION

NATALIE KAKOVITCH, *Strategic Research Consultant, Toyota Financial Services (TFS)*

DEALING WITH DATA

KEVIN MCGINLEY, *Co-founder and Owner, Red Pill Analytics*

HOW MILLENNIALS AND GEN Z ARE CHANGING THE GAME: A YOUTH CULTURE IMMERSION

WYNNE TYREE, *Founder and President, Smarty Pants*

THE POWER OF INCENTIVE FULFILLMENT: RETAINING AND REWARDING RESEARCH RESPONDENTS

MARK HUGHES, *Manager, Global Payment Solutions, hyperWALLET*

ENGAGING MILLENNIALS TO IMPROVE PRODUCT TESTING

MENAKA GOPINATH, *President, Ipsos SMX North America*

Millennials, especially young males, are a difficult group to target for research, particularly online product tests: low engagement and interest leads to under-representation on online panels, and low accountability means we see low response rates at the recall stage among those who have agreed to test a product. This often means research online among this group is not viable, especially where incidences are low: it is not always possible to recruit all our sample online and, where it is possible, high product coverage is needed. Face-to-face research provides an alternative solution, however, costs are much higher than for online. Our presentation will focus on how market research online communities can be a viable alternative for product testing. We will take a look at recent Ipsos SMX community case studies where participation in discussion increased engagement and accountability, leading to high response rates at a lower cost than we would see face-to-face.

Ipsos SMX



GOPINATH



NEW!

IN-THE-MOMENT RESEARCH: THE PAST, PRESENT AND FUTURE

SPONSORED BY CONFIRMIT

In this session, we will demonstrate, through examples, how in-the-moment research has changed in recent years

and discuss how to leverage today's technologies to:

- Reach your participants at multiple touch points
- Gather feedback at the most important times during the experience
- Utilize media to increase data accuracy and participant engagement

This session will also explore the future of in-the-moment research and how technologies like geofencing and beacons have the power to enhance the in-store shopping experience and to drive more meaningful feedback.

Confirmit.

NEW!

NEW!

NEW!

BRIDGING THE GAP BETWEEN MARKETING AND FINANCE IN THE AGE OF BIG DATA

RYAN BARKER, *Managing Partner, BERA Brand Management*
STEVE HOPKINS, *Principal, Market Cube*

In this case study, we will define brand love and illustrate how consumer brand love grants companies the opportunity to maximize their pricing power and volume potential. Learn how we are able to map the emotional triggers that drive consumers as it relates to these two key factors. We will cast a new light on brands and how they are currently measured. For example, most companies manage their brands categorically, typically failing to see their brands agnostically - as do real consumers and customers. The challenge lies in an outdated understanding of "Dominance"; a notion historically considered categorical in nature. However, brand love is relative and must be earned, heard and measured constantly within a broader context of mind, heart and wallet share. Brand love is the single greatest protector of profitability so please join us to learn how we have solved the mysteries of measurement, tracking and prescriptive, corrective action. We look forward to showing how BERA Brand Management and Market Cube use the BERA platform to measure 4,000 brands across 200 categories on a weekly basis. Learn what methodologies, technologies and unique measurements we wield in gathering consistent and actionable results for marketers and researchers. Join us for this fascinating glimpse into systematic measurement of the emotional connection between brands and profitability.



BARKER



HOPKINS

THE BATTLE OF BLACK FRIDAY: HOW A FRESH APPROACH TO SEGMENTATION DROVE RECORD SALES

TIM HOSKINS, *President, Quester*

In 2012, consumers in the U.S.



spent a record \$59.1 billion in a four-day period known as Black Friday weekend. In this session, Quester's consumer electronics client will review their approach to research that helped the company realize the full potential of this shopping phenomenon. Participants will learn how consumers were classified, through their Black Friday stories, into distinct segments and how the marketing team tailored strategies for each one. As testimony to this new approach, participants will see specific marketing examples from the past two years, which led to record sales growth.



HOSKINS

TAPPING INTO TECHNOLOGY TO UNDERSTAND THE CONSUMER JOURNEY

PAUL DONAGHER, *Managing Director, Consumer and Retail, Market Strategies International*

CONCEPT RESEARCH: BEST PRACTICES + CASE STUDIES

HEMEN PATEL, *President, QualQuant Signals*
KIMBERLY STRUYK, *SVP, QualQuant Signals*

EMBRACE STANDARD DEVIATION: A RANDOM SAMPLING ON DOING THINGS DIFFERENTLY THAN THE NORM

ROBIN PEARL, *Vice President, Consumer Insights, North America, The Estée Lauder Companies*

FASTER HORSES – LESSONS LEARNED ABOUT INSPIRING INNOVATION

JOHN DAHL, *Principal, Red Wing Research LLC*

THE INTENGO TANGO: THE FAST DANCE TO INNOVATION AND NEW PRODUCT DEVELOPMENT

SANDY MCCRAY, *Insights Curator, Intengo*

SELF-REPORT AND BEHAVIORAL DATA: ASYMMETRY OR ALIGNMENT?

KATIE HANSEN, PH.D., *Consumer Insights Analyst, Etsy*

THE TOP 10 CUSTOMER ADVISORY PANEL PITFALLS

JUSTIN ETHINGTON, *Partner, Volt Marketing*

NEW!

DATA SECURITY: DON'T RISK BEING THE WEAK LINK

DAVID CHRISTIANSEN, *Managing Partner, Ezentria, Inc.; CASRO Institute for Research Quality*

PETER MILLA, *CIRQ Technical Advisor, Peter Milla Consulting*

Data security is an issue of increasing importance. Any weak link in the research process chain, including your providers, can result in a data breach, reputational damage and liability. Understand the issues and the actions required to mitigate risk, along with the benefits of incorporating protocols of an international standard like ISO 27001, which describes best practice for an information security management system (ISMS). Certification to ISO 27001 by a third party demonstrates that an organization is following international information security best practices. The CASRO Institute for Research Quality (CIRQ) provides ISO 27001 certification.



FIELD OF SKU – RESEARCH WITH WEARABLE EYE-TRACKING

JOANNA FIEDLER, *Vice President, Tobii Pro North America, Tobii Technology, Inc.*

CONTEXT IS KING: PREDICTING AD PERFORMANCE IN THE REAL-TIME COMPETITIVE LANDSCAPE

JOSH BERGER, *Senior Research Director, Phoenix Marketing International*

DAVE GORDON, *Senior Vice President, Phoenix Marketing International*

WIN THE BRAIN GAME: NEURO-COACH YOUR CAMPAIGN FROM IDEA AND ANIMATIC TO FINISHED, MULTICHANNEL CREATIVE

PRANAV YADAV, *CEO, Neuro-Insight U.S.*

CO-CREATION IN THE FAST LANE

SUSAN ABBOTT, *President, Abbott Research + Consulting, QRCA*

USABILITY TESTING FOR MARKETING RESEARCHERS: A QUICK-START GUIDE

CORY LEBSON, *Principal User Experience Consultant, Lebsontech LLC*

TALENT MANAGEMENT CHALLENGES, OPPORTUNITIES AND BEST PRACTICES

MICHAEL ROSENBERG, *Managing Director, J.P. Morgan*

TURN CUSTOMER FEEDBACK INTO ACTION – OPERATIONALIZE YOUR DATA

RUDY NADILLO, *President, North America, Dapresy*

WEARABLES – TAKING THE NEXT PLUNGE INTO CONSUMER PRODUCTS

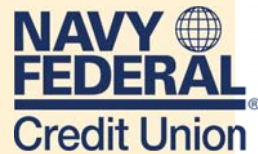
SEAN OTTO, *Business Development, Cyient-Insights*

NEW!

ORGANIZING FOR STORYTELLING

ERIC WHIPKEY, *NAVY FEDERAL CREDIT UNION*

Whether your client is internal to your company (as in client-side researchers) or external (as in supply-side researcher), stakeholders and leaders want answers now and need to show ROI for the projects they authorize or conduct. How can research professionals hope to answer this call without compromising the rigor and fidelity that we demand of ourselves? What other profession(al)s can we look to for best practices in telling stories with data under ever-increasing time constraints? In this session, we will discuss what journalists and marketing researchers have in common and also look at what other storytellers can teach us about organizing and presenting information. Also, if marketing research departments were to add journalists to their ranks, what kind of corporate or department structure might work to leverage their unique talents and perspectives?



BRANDING YOUR MARKET RESEARCH DEPARTMENT

KRISTEN SANTOS, *Manager, Market Planning and Analysis, Daimler Trucks North America*

DO WE NEED TO CONTROL FOR NON-QUOTA VARIABLES?

FRANK KELLY, *SVP Global Marketing and Strategy, Lightspeed GMI*
DEB SANTUS, *VP Sample Strategies, TNS*

FROM PRACTITIONERS TO THE C-SUITE: WHO REALLY INFLUENCES B2B PURCHASES?

ANDREW ELDER, *SVP Marketing Sciences, Illuminas*
CARRIE ANGIOLET, *Senior Vice President, Illuminas*



Using data from hundreds of qualitative and thousands of quantitative interviews, Illuminas explored variations in B2B purchases and decision making to understand how brands engage at different points within an organization, from managers all the way to the C-Suite. In this presentation we will explore the complex relationship between decision-making, purchase influence and job titles, and will equip attendees with best practices for screening and managing B2B sample to get at the right purchase influencers.



ANGIOLET



ELDER

NEW!

IT'S NOT JUST THE ADS! NEW METHODS TO IDENTIFY HOW ADVERTISING AND OTHER IN-MARKET INFLUENCES BUILD CONSUMER PREFERENCE

JERI SMITH, *President and CEO, Communicus, Inc*
KACY DOSTER, *Senior Account Director, Communicus, Inc.*



This presentation demonstrates the value and application of analytic techniques that illuminate how advertising and other in-market dynamics lead to brand choice in the highly competitive mobile device category. Do Apple-bashing ads help Samsung build preference for their Galaxy devices? How powerful are word-of-mouth dynamics versus consumers' preconceptions about a given brand? For parents, what role do children's requests play in determining which tablet or mobile phone they buy for their kids? We will show how advertisers can develop more effective campaign strategies and tactics by using advanced analytic techniques such as Structural Equation Modeling to gain a broader understanding of how all marketplace dynamics work together in influencing brand choice.



SMITH



DOSTER

NEW!

VIVID EXPERIENCES – MAXIMIZE IMPACT WITH BEHAVIOR-BASED QUALITATIVE

KELLEY STYRING, *Principal, InsightFarm Inc.*

FROM MOBILE-MONSTERS TO MOBILE-MODELS: AN INTERACTIVE SESSION ON CREATING MOBILE-FRIENDLY QUESTIONNAIRES

KEN ROE, *Vice President of Software Engineering, SSI*

REDESIGNING ONE OF THE LARGEST SURVEY PROJECTS CONDUCTED IN THE U.S.: A CONSUMER REPORTS CASE STUDY

STEVEN WITTEN, *Director, Survey Research, Consumer Reports*

WHY DOING RESEARCH THE OLD WAY DOESN'T CUT IT IN 2015 (AND BEYOND)

RODDY KNOWLES, *Director of Mobile Research, Research Now*

A NATION OF NUMBERS – THE DEVELOPMENT OF MARKETING RESEARCH IN AMERICA

PAUL SCIPIONE, PH.D.

THE ADVANTAGES OF BEING HUMAN IN A CONSUMER WORLD

JIM CHASTAIN, *Founding Partner, RealityCheck*

BRANDS AS STEREOTYPES®: IMPLICATIONS FOR MARKETERS AND RESEARCHERS

JEREMY SACK, PH.D., *Author*

BRAND WARS 2015: LEVERAGING OPEN-ENDS TO UNCOVER WHO WILL WIN AND WHY

CATHERINE HAVASI, *Co-founder & CEO, Luminoso*

JEN DROLET, *Managing Partner, iModerate*

HOW A POORLY-WRITTEN CONCEPT CAN KILL A GREAT IDEA

STEVE NOLLAU, *President & Chief Strategy Officer, Brádo Creative Insight*

MAKING HEALTHY MARKETING RESEARCH AND FOOD DECISIONS

KAREN ROBB, *Manager, Customer and Marketing Research, American Heart Association*

JEFFREY ADLER, *Managing Director – Primary Market Research Practice Lead, Centrac - A Division of Veris Consulting*

MAUREEN AUSTEN, *Senior Manager, Primary Research Group, Centrac - A Division of Veris Consulting*

NETWORKING

Quirk's Connect

When creating an event that offers an integrated experience with greater networking opportunities, we knew we wanted an innovative app that would connect everyone at the event. The Quirk's Event App – "Quirk's Connect" – is a complimentary, state-of-the-art app that not only functions as a repository for all vital content of the event, it also acts as the social media hub and is designed to help attendees and exhibitors easily make connections – old and new.

Registered attendees simply create a profile or connect their LinkedIn account to the app and answer a few questions. The app then recommends connections, focusing on other attendees with similar interests. App users can chat with other attendees and even request meetings. Attendees can view profiles of the exhibiting firms and request private meeting times with particular vendors. The app's robust scheduler will keep track of all personal meetings and events.

Cocktails with Quirk's

We've had blast hosting Cocktails with Quirk's in the past and The Quirk's Event wouldn't feel complete without everyone enjoying a few cocktails on us! After the first day of the show is done, mingle and network in the expo hall and take in the experiences with other attendees from 5:00 pm to 6:30 pm. Free drinks and appetizers will be provided!



The MR Musical Jam Session

Looking for a good place to grab dinner, experience Brooklyn nightlife, hear great music and slip in a little networking? Check out Brooklyn's Hill Country – Barbecue, Market, from 7:30 p.m. on Sunday, February 22nd to hear MMRA's Executive Director Mark Michelson and other talented MR musicians perform live! Michelson will be bringing together the most talented musicians in the (market research) industry to perform live on Hill Country's stage. The stage is one floor up in a loft space overlooking the restaurant. This all-MR jam session is a great way to kick-off the event!

Are you a market research musician who wants to perform? Contact Mark Michelson at mark@mmra-global.org.

The Research Club's networking event

Get out and enjoy a little Brooklyn night life and low-key networking with The Research Club on Monday night. Working to connect people within the market research industry, The Research Club believes there's nothing better than bringing people together for their mutual benefit. Catch up on the industry's latest while making new contacts and re-connecting with existing ones. Sound interesting? Visit www.TheResearchClub.com for more information and pricing.



THE EXPO HALL

The exhibit hall is at the center of the Quirk's Event. Boasting a wide variety of product and solution providers, the expo is designed so you can talk with and learn from the most cutting-edge and stimulating companies in marketing research. With prizes, demos, interactive games, foods and beverages and expo tours, Quirk's will work hard to ensure the expo hall is a fun and engaging place you'll want to return to again and again during your visit.





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EVENT



NOT JUST A MARKETING RESEARCH CONFERENCE, AN INSIGHTS EXPERIENCE

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Q

Names of Note

In Memoriam...

- **Jean-Marc Lech**, co-president of Ipsos, passed away on December 2 in Paris. He started his career in 1970 at the Institut Français d'Opinion Publique where he became CEO in 1980. In 1982, he joined Ipsos as co-president alongside Didier Truchot, the company's founder.
- Telstra, an Australian telecommunications company, has named **Joe Pollard** as group managing director, Telstra media and marketing.
- **Julian Kenway** has joined London research firm SPA Future Thinking as commercial director.
- M3 Global Research, Washington, D.C., has appointed **Roni DasGupta** as president of market research, Americas. Also, **Anton Richter** was promoted to managing director of market research, Europe.
- In Melbourne, Australia, Roy Morgan Research has appointed **Hugh Amoyal** as its deputy CEO and promoted **Howard Seccombe** to chief digital officer.
- Newcastle, U.K., research firm Explain has hired **Kat Allen** as market research executive and **Rhonda Winkill** and **Michael Spink** as market research assistants.

- **Rachel Epley** has joined Epley Research & Consulting, North Liberty, Iowa, as a partner.
- London marketing company Ebiqity has appointed **Julie Baddeley** and **Tom Alexander** to its board as non-executive directors.
- The Toronto office of Ipsos UU, the qualitative research arm of Ipsos Marketing, has hired **Gayle Lunn** as vice president and **Christian Arambulo** as director.
- Intellishop, a research firm in Perrysburg, Ohio, has named **Steve Connelly** as vice president, client operations.
- Research by Design, Birmingham, U.K., has hired **Tracey Downes** as a senior market research executive.
- **Allie Kline**, chief marketing officer for AOL Platforms, has been promoted to CMO for all of AOL operations, headquartered in New York.
- Informate Mobile Intelligence, Mumbai, India, has appointed **Will Hodgman** as CEO. The company plans to move to new global headquarters in Seattle.
- MWW, a New York public relations firms, has promoted **Marisa Conway** to vice president, technology.
- **Deepak Singh** has assumed the newly created role of executive director and head of Ipsos marketing in India. He will be based in the Bengaluru office.
- **Ben Sargeant** has been promoted to managing director for Portsmouth, U.K., mystery shopping firm Douglas Stafford.
- Xaxis, the New York audience profil-

ing and targeting division of WPP, has named **Mickey Zhang** as managing director in China.

- The British Marine Federation, a trade association based in Surrey, U.K., has hired **Alastair Wilson** as head of its statistics and market research service.
- **Giles Finemore** has been named as the chair of AURA, the London-based networking forum for client-side insight professionals.
- Assembly, a New York marketing firm, has hired **Paul Beck** as executive vice president, director of strategic services.
- U.K. research company Simpson Carpenter has appointed **Weiwei Yang** as senior research manager in its pharmaceutical division and **Charlotte Donald** as research executive on the major studies team. **Paul Roberts** has joined as digital director.

■ **Pam Maltby** has joined Research Now, Plano, Texas, as senior vice president of client development.



Maltby

- **Greg Heist** has been promoted to chief innovation officer of Gongos Inc., an Auburn Hills, Mich., research firm.
- Targetbase, a Dallas marketing company, has hired **Manny Mattos** as vice president, new business development.

■ **Marcia Kalfas** has joined Barlow Research Associates Inc., Minneapolis, as client engagement executive, with responsibilities for new business development.

■ Toronto-based Engagement Labs has

quirks.com/articles/
2015/20150211

appointed **Bryan Segal** as CEO, replacing founder **Paul Allard**, who will assume the role of chief innovation officer.

■ *EDigitalResearch*, Southampton, U.K., has hired **Liz Ratcliffe** as product manager in its product marketing division.

■ Westport, Conn., research firm *Critical Mix* has appointed **Kevin Orians** as head of its customer care team.

■ **James Llewellyn** has joined Nuremberg, Germany, research company the *GfK Group* as its UK head of shopper.

■ At the London office of *uSamp*, a research firm headquartered in Encino, Calif., **Will Boyd** and **Richard Merrick** have been promoted to sales director and **Rahul Krishna** has been promoted to senior account director. **Martin Schmidt** has joined the *uSamp* Frankfurt, Germany, office as account director.

■ Enfield, U.K., retailer *Tesco* has promoted **Robin Terrell** to head of customer.

■ **Bruce Goerlich**, chief research officer at New York researcher *Rentrak*, was elected to the Advertising Research Foundation's board of directors in New York.

■ Red Hill, U.K., sensory research firm *product perceptions* has promoted **Simon Howitt** to senior associate director and **Tammy Sykes** to senior research executive. **Denise Bedford** joined the firm hired as a senior research executive.

■ London researcher *The Sound* has hired **Caroline Noon** as research director.

■ London-based *Millward Brown Vermeer*, the market strategy division of Millward Brown, has appointed **Patrick Fry** as director for Australia and New Zealand.

■ London researcher and pollster

ComRes has promoted **Tom Clarkston** to research team leader. **Rob Melville** has joined the company as research team leader in charge of FMCG and food and beverage. In addition, **Aahad Ali**, **Ross Graham**, **Josie Warner** and **Moritz Reinsch** were hired as consultants.

■ In London, the *Guardian News and Media* has appointed **Charlotte Putnam** as audience director. She will be responsible for commercial insight, consumer insight and primary research.

■ *Think Now Research*, Burbank, Calif., has added **Heather Scrittorale** and **Greg DeLacy** to the business development team.

■ *M3 Global Research*, Washington, D.C., has promoted **Michael Wildt** to head of sales and **Jim Anderson** to senior vice-president of sales operations.

■ *Lightspeed*, a Warren, N.J., research firm, has appointed **David Bilicic** as vice president of business development.



Bilicic

■ **Kary Ball** has joined *Midwest Video*, Troy, Mich., as its chief technology officer, responsible for development of on-site technologies, the M-Stream video streaming platform and the M-Groups online focus group service.

■ In Cincinnati, *MarketVision Research* has hired **Mary Ellen Motyl** as a research manager on the qualitative client services team.

■ **Patrick Arminio** has joined *Quester*, a Windsor Heights, Iowa, research company as vice president of client services.

■ *Innovate*, a research firm headquartered in Encino, Calif., has hired **Vanessa Carey** as senior vice president of global account management and has promoted **Amanda Keller** to vice president of global

client services and **Jason Poyser** to director of account management. The company has also opened an office in Gurgaon, India.

■ **Christine Dalzell** was named vice president of U.S. research at *HRW*, a London health care research firm.

■ *Prodege MR*, a new division of the Prodege research company specializing in sampling and based in El Segundo, Calif., has hired **Kris Tarbet** as vice president of sales and **Daniel Ross** as vice president, product management. **Dave Gaston** joined parent company Prodege as vice president, sales.

■ In London, *ResearchBods* has hired **Louis Davies** as client services director, **Shannon Berry** as public relations and marketing manager and **Benjamin Pelc** to the project management team.

■ **Rana Baroud** and **Anna Fair** have joined *Chrysalis Research*, Bristol, U.K., as research managers.

■ **Sharon White** will be promoted to CEO at *Ofcom*, the U.K. communications regulator in London, effective late March.

■ **Serena Jacob** has joined Singapore-based *TNS Qualitative* in Asia Pacific as managing director.

■ *Infotoools* has appointed **Amanda Boote** as business development director for Infotoools Europe. She will be based in the London office. Also, **Jonathan Bear** has been promoted to managing director of Infotoools Seattle.

■ London researcher *Hall & Partners* has promoted **Kelly Mitchell** and **Bridget Brennan** to partner level. Both are based in the firm's Chicago office.

■ *Rocket Fuel*, a Redwood City, Calif., marketing firm specializing in artificial intelligence, has hired **Manu Thapar** for the newly created position of senior vice president of research and development.

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Research Industry News

News notes

■ The Research Industry Index

(RII) of the Washington, D.C.-based **Marketing Research Association** (MRA) has remained above 100 for the fifth consecutive quarter. This signals a recovery for the U.S. market research industry, according to the MRA. The RII was based on online interviews with 197 owners or senior-level managers and addressed business conditions ending with the second quarter of 2014, including projects, staffing levels and the owner's perception as to the health of their firms.

■ **The U.S. Census Bureau** is proposing to cut seven questions from its American Community Survey, sent annually to 3.5 million residents. Five of the questions address current marital status and changes in status during the past year, the sixth asks in what field the respondent earned a degree and the last checks if there is a home-based business. Dropping the marital status questions would leave the U.S. without annual data on marriage and divorce rates. The changes must be approved by the Office of Management and Budget. Norman M. Bradburn, a University of Chicago researcher, suggested that better choices for deletion would be questions on household finances and if the facility has indoor plumbing.

■ The Interactive Advertising

Bureau (IAB), New York, advocates 70 percent as the best threshold for viewability measurement, agreeing with the Media Rating Council that 100 percent is currently unreasonable due to variation among browsers, ad units and measurement methodologies. The IAB suggested that publishers, agencies, marketers and ad tech companies work together to resolve the measurement differences. Its report, *State of Viewability Transaction 2015*, outlined seven proposals to promote collaboration and trust.

■ SurveyMonkey, Palo Alto, Calif., will join with research firm Westat, Rockville, Md., and Pew Research Center, Washington, D.C., to examine non-probability research and methods of evaluating survey quality. Each organization will contribute data and staff time, with SurveyMonkey providing access to its online panel, Westat collecting data from a nationally representative sample of adults and Pew Research using its representative American Trends Panel and national telephone surveys. The research project will examine the science leading to the adjustments and weighting in four methods of sampling: non-probability Internet-based, address-based and probability-based phone and Internet. The study will also identify which sampling methods are most appropriate for specific research objectives. Results of the project will be made publicly available.

■ The Irish radio industry plans to test a new audience measurement system in 2015 as a possible alternative to the current system provided by Dublin research firm **Ipsos MRBI** for the Joint National Listenership Research (JNLR) ratings. Members of the JNLR committee have met with Ipsos MRBI regarding its mobile audience measurement system MediaCell and also with Norwegian public service broadcaster NRK re-

garding its people meter technology in measuring its audiences.

■ Portland, Ore., researcher **Rentrak** has been issued a patent by the U.S. Patent and Trademark Office for its process which determines the television shows with the most engaged viewers based on Rentrak's Stickiness Index measurement.

The Index is used in Rentrak's TV Essentials system and its weekly reports. Separately, the U.S. Patent and Trademark Office granted Rentrak patents securing Rentrak's intellectual property rights around Exact Commercial Ratings, which refers to the Rentrak system for rating national commercials, and for a system which detects problems with return path TV data storage.

Acquisitions/transactions

■ London research firm **Brandwatch** has acquired **PeerIndex**, a London firm specializing in audience analytics. The PeerIndex staff of 10 will join Brandwatch.

■ **Question Pro**, a Seattle research firm, has acquired **RapidEngage**, a San Diego software firm. Terms were not disclosed.

■ **The SportsOneSource Group**, research firm, Charlotte, N.C., is acquiring the **VantagePoint POS** data-reporting platform from the Outdoor Industry Association (OIA). It plans to provide its retail partners with free access to a revised version of VantagePoint, while current OIA members will have free access through March 2015 and subsequently by subscription.

■ **Kantar** has bought the majority interest in **IBOPE Media**, Sao Paulo, which includes IBOPE Pesquisa de Midia e Participacoes, IBOPE Latinoamericana and IMI.com. It also acquired the remainder of Millward Brown do Brasil. WPP had been a



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minority shareowner in IBOPE Media since 1997. IBOPE Media will maintain its senior management, with Orlando Lopes continuing as CEO.

■ **JSWT** New Zealand, a division of marketing group WPP, has acquired a majority stake in Wellington, New Zealand-based **Heyday**, which specializes in digital strategy, user experience design and app and Web site development.

■ Boston information and consulting services firm **IHS Inc.** has acquired **Infonetics Research**, based in San Francisco.

■ Paris marketing and media company **Publicis Groupe** has acquired **Relevant24**, a Boston marketing firm which specializes in multimedia branded content. The firm will operate as a standalone unit within the Starcom MediaVest Group (SMG) division of Publicis, with Marc Gallucci and Lane Murphy continuing as CEO and president respectively. Gallucci will join SMG's Global Leadership Council.

■ Private investment firm **RLJ Equity Partners**, Bethesda, Md., has acquired entertainment sector researcher **MarketCast**, Los Angeles.

■ The management of Iselin, N.J., business analytics firm **Vedicsoft Solutions** have bought the firm from its founders.

■ Portland, Ore., researcher **Rentrak** has completed the acquisition of WPP Kantar's television measurement unit for 1.5 million shares of Rentrak common stock, with an approximate value of \$128 million. WPP also purchased additional restricted shares of Rentrak common stock for \$56 million, giving WPP an ownership stake of 16.7 percent of Rentrak stock.

■ **Possible**, a New York WPP marketing agency, has acquired Portland, Ore.,

research firm the **Swift Collective**. Terms were not disclosed.

■ **Omnicom**, a New York-based holding company, which had held 50 percent ownership in Calgary, Canada, marketing firm **Critical Mass**, has purchased the remaining stock of the agency. Dianne Wilkins, Critical Mass CEO, will move to New York but the firm's headquarters and employees will remain at the Calgary site.

■ **Next Fifteen**, a U.K.-based digital communications group, has acquired a 75 percent stake in London-based brand performance researcher **Morar**, for up to £1.8 million in cash. Morar founders Roger Perowne and Alistair Cunningham will remain with the business.

■ The marketing and advertising firm **Dentsu Aegis Network** has acquired **Tempero**, a London social media management company, and is expected to make it the European arm of its social media division ICUC. The terms were not undisclosed.

■ **Cello**, a London marketing ser-

vices group, has acquired San Francisco-based health care researcher **Worldwide Promedica**. It will become part of the Cello Health division, also based in London. The terms of the deal were an initial \$700,000 in cash and up to an additional \$1.8 million based on performance over the next three years. The purchase provides Cello with its first foothold on the U.S. West Coast.

Alliances/strategic partnerships

■ **MarketResearch.com**, Washington, D.C., is partnering with **Trendtype**, a London Research firm, to distribute Trendtype's proprietary market analyses through the MarketResearch.com site. Separately, MarketResearch.com has partnered with **DelveInsight**, a New Delhi, India researcher, to distribute its market analyses through MarketResearch.com.

■ **Moat**, a New York marketing firm, and New York researcher **Nielsen** have reached an agreement allowing Moat to integrate Nielsen Online Campaign Ratings data into its platform.

■ **Macromill**, a Tokyo research firm,

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has joined with **CareNet**, a medical information provider also in Tokyo, to provide research services for the medical sector. The joint venture will be known as Macromill-CareNet.

■ **Merkle**, a Columbia, Md., CRM marketing firm, is partnering with Copenhagen, Denmark, software company **Sitecore** in a move to boost the Merkle technology and insight capabilities, allowing its clients to personalize digital experiences for their customers.

■ **Collective**, a New York marketing and advertising firm, is partnering with New York researcher **Nielsen** to utilize its Nielsen Catalina Solutions (NCS) data in providing marketers with ROI measurement and analysis. The move is also designed to assist Collective in identifying high-potential audiences and then using the NCS technology to buy linear TV and digital ads.

■ Istanbul, Turkey, research firm **Barem** and **OPR Research**, a Turkish retail panel specialist, have signed a cooperation agreement to provide mutual clients with “new generation” information services. Barem is a member of the WIN/Gallup network. OPR executive Levent Orhun joined Barem as CEO in January and Pervin Olgun, founder of Barem, will serve as president of the partnership.

■ **Indegene**, a Bangalore, India, marketing firm specializing in life science, pharmaceutical and health care organizations, has partnered with Tokyo-based pharmaceutical sales support and research services company **CareNet Inc.**

■ **Krea**, a Chennai, India, researcher specializing in health care fieldwork, has joined **Global Market Research**, an international partnership of accredited independent research companies.

■ **CSM Media Research**, Hong Kong, and London researcher **Kantar Media**, both divisions of WPP, have partnered with Hong Kong’s largest TV broadcaster, **Now TV**, to begin the area’s first cross-platform television

audience measurement system that includes both in- and out-of-home.

Association/organization news

■ **The Council of American Survey Research Organizations (CASRO)**, Port Jefferson, New York, has begun a Safe Harbor Program to assist research companies in complying with the EU Directive on Data Protection and the U.S. Department of Commerce Safe harbor requirements. CASRO will also provide an online complaint-handling service through the Council of Better Business Bureaus, free for EU and Swiss residents.

■ **The CASRO Institute for Research Quality (CIRQ)**, Port Jefferson, N.Y., has awarded its certification to **Full Circle Research** for compliance to the ISO 26362:2009 Standard for access panels in market, opinion and social research. Separately, **Russell Research Inc.**, New York, was certified by CIRQ for compliance to the ISO 20252 Standard for Market, Opinion and Social Research.

■ **The Association of Market and Social Research Organizations**, Sydney, is the first group to have its privacy code registered by the Australian Privacy Commissioner. The body designed its own privacy code for members in 2003 and completed the Privacy (Market and Social Research) Code 2014 in March 2014.

Awards/rankings

■ In London, **Ipsos MORI** and its client **Amgen**, a Los Angeles biotech company, received both the Grand Prix Award for Greatest Impact and the Healthcare Research award at the **Market Research Society (MRS)** awards ceremony. The MRS President’s Medal was awarded to **BBC Media Action**, London. **Flamingo**, a London marketing agency, and **Nunwood**, a London CEM firm, each won a Best Agency award for their respective agency size.

■ Singapore-based **Merlien Institute**, which organizes market research conferences, will sponsor a new set of

seven awards to recognize individual as well as company achievements in areas of new technology, mobile technology and client-supplier collaboration. More information can be found at mrmw.net/award-categories.

■ **TNS Research and Marketing Services**, a Lagos, Nigeria, research firm, was named Marketing Research Agency of the Year at the 2014 Marketing World Awards held in Lagos.

■ **L&E Research**, a marketing and focus group facility firm in Raleigh, N.C., was named to the list of the 5,000 fastest-growing private businesses in the U.S. by **Inc.** magazine, appearing at 753rd in the ranking. L&E’s revenues grew 606 percent, to \$4.7 million, in the past two years, the time frame used for the list.

New accounts/projects

■ **Mediapulse**, a Bern, Switzerland research firm, has extended its contract with Nuremburg, Germany-based **GfK Group** beyond 2017. The contract provides for GfK using its new Mediawatch platform to measure the country’s radio audiences.

■ Dublin consulting firm **Accenture** has won a seven-month contract from the **Japan Tourism Agency** to provide consultation in bringing tourists to Japan, part of the government’s goal to attract 20 million foreign tourists in the period prior to the 2020 Olympic Games.

New companies/new divisions/relocations/expansions

■ New York research firm **WorldOne** has rebranded as **SERMO**.

■ In Dubai, Tamara Deprez and Maha Ahmad have launched **The360mix**, a marketing and advertising agency.

■ Rotterdam, Netherland, researcher **SKIM** has opened an office in Singapore which will be led by Robin de Rooij.

■ London research company **MMR** has opened a new sensory science center

in Singapore, headed by Antonella Scarabelli.

■ Cincinnati firm **Directions Research Inc.** has expanded its operations with the opening of an office in Greensboro, N.C., which will be headed by Betsy Sutherland.

■ In Redhill, U.K., Craig Scott and Martin Schlaeppi have opened **Greensand**, a market research firm specializing in the medical device industry.

■ Toronto management consulting firm **GlobeScan** is opening an office in Cape Town, South Africa, which will be headed by Anneke Greyling.

■ **WHY5Research**, a research firm based in Antwerp, Belgium, has opened a Mena office in Dubai, to be headed by Ahmed Sulaye.

■ **Zenith International**, a Bath, U.K. research firm, plans to open a new regional office in Dubai.

■ London-based researcher **VoxPopMe** has opened a Singapore office, with Robert Fry as managing director for Asia Pacific.

■ **The Utah Valley University**, Provo, Utah, has opened a SMARTLab as part of its Business Resource Center. The lab is equipped with advanced sensory tools including eye-tracking devices, galvanic skin response sensors and facial coding equipment. The facility also includes focus group and observations rooms. Vivint, a Provo, Utah-based consumer electronics firm, and its CEO and founder, Todd Pedersen, each contributed \$1 million toward the cost of the lab. UVU students, faculty and staff will work with companies in the use of the sensory tools and analysis of the data they provide and will give UVU students hands-on experience.

Research company earnings/ financial news

■ San Francisco software firm **Splunk** reported its third-quarter revenue

increased 48 percent to \$116 million but its operating loss also increased to \$45.5 million due to higher costs.

■ **Blab**, a Seattle-based social intelligence startup, has raised \$8.8 million of an \$11.6 million Series B round. Blab provides a predictive algorithm to help brands and agencies anticipate online consumer discussions before the topics become mainstream.

■ **Framed Data**, a San Francisco based predictive analytics startup, has raised \$2 million in seed funding. The capital will be used to hire engineers with experience in distributed systems, machine learning or data visualization and to increase Framed Data's sales team.

■ **RealityMine**, a Manchester, U.K., market research technology firm, is planning a second funding round of £1.6 million. The latest cash is earmarked for recruitment of additional technical, sales and client support staff and for further expansion.

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The Southwest Chapter of the Marketing Research Association will hold its annual Las Vegas conference on **February 10-12** at the Mirage Hotel and Casino in **Las Vegas**. Visit www.swmra.org/events/vegas2015.

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://wbresearch.ch/qud>.

The 2015 Winter Marketing Educators Conference will be held **February 13-15** at the San Antonio Marriott Rivercenter in **San Antonio, Texas**. Visit www.ama.org/events-training/Conferences/Pages/Winter-Marketing-Educators-Conference.aspx.

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 International Quality and Productivity Center will hold its CMO Exchange on **February 22-24** in **Orlando**. Visit <http://www.cmo-exchangeusa.com>.

The MSPA will hold its Latin America 2015 Conference on **February 23** in **Cancun, Mexico**. Visit <http://www.mspa-la.org/en/.html>.

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

Gartner will hold its business intelligence and analytics summit on **February 23-24** at the Sydney Hilton in **Sydney, Australia**. Visit www.gartner.com/technology/summits/apac/business-intelligence/.

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 World – 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.etchouches.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/>.

The 2015 Predictive Analytics World conference for business will be held on **March 29 – April 2** in **San Francisco**. Visit <http://www.predictiveanalyticsworld.com/sanfrancisco/2015/>.

IIR will hold the annual FUSE conference on **April 13-15** in **Chicago**. Visit www.iirusa.com/fuse.

Empresarial will host its spring studies trade show on **April 16-17** at the Palais Brongniart in **Paris**. Visit www.printemps-etudes.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.



Q

2015

Research Software Directory

The 2015 Directory of Marketing Research Software was compiled by sending listing forms to companies we identified as producers/vendors of marketing research-related software. This year's directory lists over 150 firms and over 360 software titles. The software firms are arranged alphabetically. Along with the company's vital information, we've also included the title(s) of the software they sell.

To make finding software easier, we have added a section of cross-references in which providers are grouped by solution capability.



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 (See advertisement on p. 80)



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ASKIA - Software for Surveys (New York)

New York, NY
Ph. 212-226-0039
newyork@askia.com
www.askia.com
John Rousay
Software Title(s):
askiaanalyse
askiadesign
askiaface
askiafacemobile
askiasurf
askiavista
askiavoic
askiaweb



ATP Canada Software and Services Ltd.

Newmarket, ON, Canada
Ph. 905-868-8742
sales@atpcan.com
www.atpcan.com
Dave Homer, President
Software Title(s):
Rosetta Studio

ATP is a leading provider of tabulations and other data processing services to the market research industry. Since 1989, our unwavering commitment to excellence and exceptional customer service has resulted in tremendous growth. Rosetta Studio is our software solution that helps automate the reporting of your tabular data into ready-to-go PowerPoint or Excel presentations. Use our simple interface to create charts and customize your tables or use our powerful tagging system to populate your existing presentation. Create a professional presentation in minutes! (See advertisement on p. 15)

AutoData Systems

Minneapolis, MN
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www.autodata.com
Software Title(s):
ExpertScan
NetE-nable
Scannable Office

Bayesia USA

Franklin, TN
Ph. 888-386-8383
info@bayesia.us
www.bayesia.us
Software Title(s):
Bayesia Expert Knowledge Elicitation Environment
Bayesia Market Simulator
BayesiaLab

Beach Tech Corporation

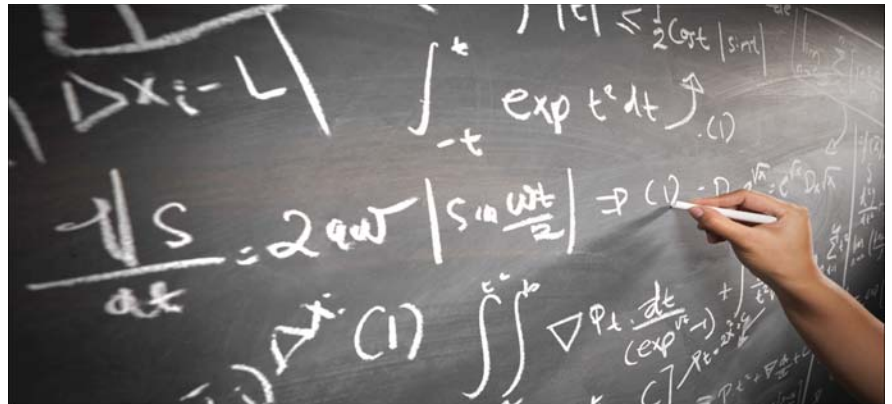
Minneapolis, MN
Ph. 612-924-9193 x521 or 800-323-0434
doug.sellner@beachtech.com
www.beachtech.com
Doug Sellner
Software Title(s):
Eform

Bruce Bell & Associates, Inc.

Canon City, CO
Ph. 800-359-7738
sales@surview.com
www.surview.com
Software Title(s):
Surview Sales Media Research Edition

Business Forecast Systems

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Software Title(s):
Maptitude
Maptitude for Redistricting
Maptitude for the Web
TransCAD

**CFMC Survox Solutions**

San Francisco, CA
Ph. 866-588-2362
sales@cfmc.com
www.cfm.com
Brian Fowler
Software Title(s):
Survox Dialer
Survox Online
Survox Phone (CATI & IVR)

CFMC Survox Solutions provides industrial-strength data collection solutions in market research and opinion polling to companies of all sizes, including one-third of the Honomichl Top 25. We specialize in precise accurate quota requirements, time-sensitive data collection processes and complex survey designs. We provide a unified platform (Survent™) for sample management; survey programming and execution; operational reporting; and data preparation across a mix of data collection modes - paper, phone, Web, IVR and heterogeneous vendor solutions. Subscription licenses and hosting are available. www.cfm.com.

**Cint USA Inc.**

Lawrenceville, NJ
Ph. 609-557-7021
learnmore@cint.com
www.cint.com
Jake Wolff, VP, Sales
Software Title(s):
Cint Access
Cint Access +tracking
Cint Engage
Cint Link

Cint provides access to opinions by innovating market research technology. Reach over 10 million people in 60 countries, all sourced via 800 different panels owned by publishers, local media outlets, market research agencies and non-profits. Cint's exchange platform, OpinionHUB, the fully transparent insight marketplace, brings together questions and answers from all around the world. Cint is proud to be certified to ISO 20252 and continues to lead the industry in quality and reliability. Cint is headquartered in Stockholm, Sweden and has offices in major cities across Europe, North America and Asia-Pacific.

**Clipstream® Survey**

Div. of Destiny Media Technologies
Vancouver, BC, Canada
Ph. 800-909-3173 (North Am.) or 1-604-609-7398 (Int'l)
quirks@clipstream.com
surveys.clipstream.com
John Pillsbury, Business Development Director
Software Title(s):
Clipstream® Video Cloud

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delivery of secure, pre-released and sensitive video, audio, image and text content; reduces dropout rates; and minimizes suspends. Clipstream® Survey video format will play on most computers, smart Phones, tablets, internet TV's and E-book readers. With no players to download or install and native support from all modern browsers, Clipstream® Survey video encoded content will have the highest play rates. Clipstream® content can easily be secured from unauthorized viewing or duplication to unauthorized domains; and protects content with Dynamic Watermarking of respondents ID.

cluetec GmbH

76131 Karlsruhe, Germany
Ph. 49-721-831790
m.helferich@cluetec.de
www.mQuest.eu
Software Title(s):
mQuest®

**Confirmit**

New York, NY
Ph. 800-864-5266
Beth.Magee@confirmit.com
www.confirmit.com
Beth Magee
Software Title(s):
Confirmit Horizons

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Contact Software Limited (Harvest Your Data)

Wellington, New Zealand
Ph. 64-21-618-585
steve.cohn@isurveysoft.com
www.isurveysoft.com
Steve Cohn, Founder and CEO
Software Title(s):
droidSURVEY - Offline data collection for Android
iSURVEY - Offline data collection for iOS

Creative Research Systems

Petaluma, CA
Ph. 707-765-1001
info@surveysystem.com
www.surveysystem.com
Chris Wright, Customer Service
Software Title(s):
The Survey System - CATI
The Survey System - Panel Management
The Survey System - Web
The Survey System - WebCATI
The Survey System (Version 11.0)
The Survey System-Integrated Interviewing Software

**Creoso Corporation**

Phoenix, AZ
Ph. 602-438-2100 or 866-665-0533
info1@digivey.com
www.digivey.com
Elisabeth Scherer, V.P. Marketing
Software Title(s):
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Sally Hooper, Owner
Software Title(s):
InterQue Online Focus Group and BBS Software

Cybernetic Solutions - The Survey Software

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Ph. 801-260-1000
cyberman@xmission.com
www.cneticsolutions.com
R. Kent Francis, President
Software Title(s):
The Survey

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Cambridge, MA
Ph. 617-661-2011
sales@cytel.com
www.cytel.com
Software Title(s):
Compass
East
LogXact
SiZ
StatXact

DataMarket, Inc.

Boston, MA
Ph. 857-265-2165
sales@datamarket.com
www.datamarket.com
Josh Boyle
Software Title(s):
DataMarket Enterprise

DATAN, Inc. - Data Analysis Systems & Services

Washington, NJ
Ph. 908-689-4060
mcstentzphd@datan.com
www.datan.com
Michael C. Stentz, Ph.D., President
Software Title(s):
MERLIN Tabulation System
MERLIN Utility Toolkit

**Decipher**

FocusVision Worldwide
Fresno, CA
Ph. 559-436-6940
info@focusvision.com
www.focusvision.com
Jonathan Tice
Software Title(s):
Beacon

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(See advertisement on p. 29)



Decision Analyst, Inc.
Arlington, TX
Ph. 817-640-6166 or 800-262-5974
jthomas@decisionanalyst.com
www.decisionanalyst.com
Jerry W. Thomas, President/CEO
Software Title(s):
ChoiceModelR™
STATS™ 2.0

Decision Analyst offers two free marketing research software programs: STATS 2.0 functions include crosstabulation, correlation, factor analysis, multiple regression, cluster analysis and significance testing; ChoiceModelR™, an open-source package written in the R language, analyzes conjoint and choice modeling data. ChoiceModelRTM handles large datasets and runs fast. To run ChoiceModelR™, users must download the R-language software.

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info@decisionsupportsciences.com
www.decisionsupportsciences.com
Software Title(s):
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PositionSolve
PrefSolv
SatisSolve
SegmentSolv
ValueQuest

Delphus, Inc.
Morristown, NJ
Ph. 973-267-9269 or 201-400-8916
hlevenbach@delphus.com
www.delphus.com
H. Levenbach, President
Software Title(s):
PEER Forecaster
PEER Planner for Windows

Dialsmith - Perception Analyzer
Portland, OR
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info@dialsmith.com
www.dialsmith.com
David Paull, CEO
Software Title(s):
Perception Analyzer
Perception Analyzer Online
Slidermetrix

Digsite
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jane@digsite.com
digsite.com
Jane Boutelle, CMO & Co-founder
Software Title(s):
Digsite

Domestic Data
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info@domestic.at
www.domestic.at
Raul Paramo
Software Title(s):
IRM - Internet Research Manager

Dooblo Ltd.
Kfar Sava, Israel
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ofer@dooblo.net
www.dooblo.net
Ofer Heijmans, Co-Founder
Software Title(s):
SurveyToGo



Dub
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Ph. 310 853 6986
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Stephen Cribbett (UK/Europe/Asia), Heather Wendlandt (N America)
Software Title(s):
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Software Title(s):
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EasyGoingSurvey.com
28037 Madrid, Spain
Ph. 34-91-416-4609
CustomerService@EasyGoingSurvey.com
www.easygoingsurvey.com
David Crow
Software Title(s):
EasyGoingSurvey

Eki Communications Private Limited
Survelytics - Mobile Research Division
Thane, India
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sunil.palrecha@ekiglobal.com
www.survelytics.com
Software Title(s):
Survelytics

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Mississauga, ON, Canada
Ph. 888-633-1633 or 905-542-9001
info@empathica.com
www.empathica.com
Steve Prodger, V.P., Strategic Accounts
Software Title(s):
Customer Journey Mapping
GoRecommend
Loyalty Modeling
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Prescriptive Reporting



E-Tabs
Warrenville, IL
Ph. 888-823-8227
info@e-tabs.com
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Ken Brewster
Software Title(s):
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Converso CASI
Converso CATI
Converso CAWI
Converso Enterprise
Converso Pocket/Mobile

Fleetwood Group, Inc.
Holland, MI
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www.replysystems.com
Software Title(s):
Reply



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www.focusvision.com/home.aspx
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Software Title(s):
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**GENESYS Sampling Systems**

Horsham, PA
Ph. 800-336-7674 or 215-653-7100
alambert@m-s-g.com
www.m-s-g.com
Alan Lambert, Vice President
Software Title(s):
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(See advertisement on p. 21)

Global Intelligence Alliance

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usamidwest@globalintelligence.com
www.globalintelligence.com
Scott Hall
Software Title(s):
Intelligence Plaza*

Global Intelligence Alliance

USA East Coast
New York, NY
Ph. 212-786-7368
usaeast@globalintelligence.com
www.globalintelligence.com
Victor Knip
Software Title(s):
Intelligence Plaza*

Gravic, Inc. - Remark Products Group

Malvern, PA
Ph. 800-858-0860 or 610-647-7850
sales@gravic.com
www.gravic.com/remark
Sales Department
Software Title(s):
Remark Classic OMR
Remark Office OMR
Remark Web Survey
Remark Web Survey 5

Hamilton-Locke, Inc. - Verbatim Analysis

Provo, UT
Ph. 801-356-3512 or 800-282-0044
jneubert@hamiltonlocke.com
www.hlanalysis.com
Software Title(s):
MAIA Market Attitude & Intent Analysis

Hexworx Computer Services P/L

Como, WA, Australia
Ph. 61-8-9450-4814
admin@hexworx.com
www.hexworx.com
Susan Hoddinott, Director
Software Title(s):
TestKit

Hostedware

Laguna Niguel, CA
Ph. 949-585-1500 or 800-211-6967
csc@hostedware.com
www.hostedware.com
Software Title(s):
Hosted Survey
Hosted Test

IBM SPSS Software

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Ph. 800-543-2185
salesbox@us.ibm.com
www.ibm.com/analytics
Software Title(s):
IBM Analytical Decision Management
IBM SPSS Data Collection
IBM SPSS Modeler
IBM SPSS Statistics

**icanmakeitbetter**

Austin, TX
Ph. 512-498-3830
sales@icanmakeitbetter.com
www.icanmakeitbetter.com
Paul Janowitz, CEO & Founder
Software Title(s):
icanmakeitbetter.com

icanmakeitbetter provides online customer insight communities. Our platform makes it easy to research, innovate and get feedback - anytime, anywhere, from anyone. Online communities, surveys, online focus groups, journals, live chat, ideation, panel management and innovation in a simple, single tool. The result? Better products and services, delivered faster, and marketed smarter.

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Jennifer Dale
Software Title(s):
InsideHeads

Intellex Dynamic Reporting

Almere, Netherlands
Ph. 31-33-467-8980
j.rietberg@intellexweb.com
www.intellexweb.com
Jeroen Rietberg
Software Title(s):
Data Dynamic Reporter

Intellisurvey, Inc.

Ladera Ranch, CA
Ph. 949-298-4400 or 310-907-5363
info@intellisurvey.com
www.intellisurvey.com
Jonathan Ephraim, Managing Director
Software Title(s):
Intellisurvey

**itracks**

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sales@itracks.com
www.itracks.com
Dan Weber, CEO
Software Title(s):
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itracks Board (Online Bulletin Board w/Mobile App)
itracks Chat (Online Focus Group)
itracks Community (Online Community w/ Mobile App)
itracks Video Chat (Video Focus Group)

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**Jibunu LLC**

Leominster, MA
Ph. 978-537-5510
quotes@jibunu.com
www.jibunu.com
Software Title(s):
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Jibunu RTD - Real Time Data
Jibunu RTR - Real Time Reporting

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**Kinesis Survey Technologies, LLC**

Austin, TX
Ph. 512-590-8300
sales@kinesisurvey.com
www.kinesisurvey.com
Gene Filipi, Director of Sales
Software Title(s):
Kinesis Panel
Kinesis Survey

Kinesis Survey Technologies LLC is the industry leader for future-proof market research solutions. Kinesis addresses all of your requirements, in a single solution. From surveys to panel management and communities, Kinesis is committed to advancing innovation across all browser and device types. Kinesis software can be utilized without deep programming knowledge yet is robust enough to perform the most complex of survey and panel functions. Kinesis provides the industry's most comprehensive market research product suite for industry professionals and enterprise business organizations alike.

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info@lidlow.com
www.lidlow.com
Jeff Jebson, Director of Sales & Marketing
Software Title(s):
Progression™

Line of Sight

St. Paul, MN
Ph. 651-204-6813
steve.schulz@lineofsightgroup.com
www.lineofsightgroup.com
Steve Schulz, President
Software Title(s):
Market-i Competitive Intelligence Software

LogicDepot

Mechanicsville, VA
Ph. 804-338-8364
scottwellman@logicdepot.com
www.logicdepot.net/LogicDepot_MarketResearch.htm
Scott Wellman, President
Software Title(s):
LogicDepot Feedback

Manthan Systems, Inc.
Scottsdale, AZ
Ph. 800-746-9370
online.enquiries@manthanservices.com
www.manthanservices.com
Software Title(s):
QI-BI Solution for Market Researchers

Marketing and Research Data Consultants
MRDC Ltd.
Fordcombe, Kent, United Kingdom
Ph. 44-1892-740411
narisa.t@mrdcsoftware.com
www.mrdcsoftware.com
Phil Hearn
Software Title(s):
Beacon
DDR / DRM
MRDCL
Ontraq
QPSMR
Reflect



Marketing Systems Group
Horsham, PA
Ph. 800-336-7674 or 215-653-7100
info@m-s-g.com
www.m-s-g.com
Alan Lambert
Software Title(s):
PRO-T-S; GENESYS; ARCS IVR

GENESYS Sampling Systems: See GENESYS Sampling Systems listing. PRO-T-S[®] Telephony Systems: See PRO-T-S[®] Telephony Systems listing. ARCS[®]: See ARCS[®] Systems listing. Survey Database Management Systems: A Web-based storage/browser system for market research tabulations. Point-and-click to tables, spreadsheets or maps for further analysis. (See advertisement on p. 21)

MarketingStat
4104 Oberwil, Switzerland
Ph. 41-61-401-60-55
info@mm4xl.com
www.marketingstat.com
Jonas Selz
Software Title(s):
MM4XL 9.0

MarketSight[®]

MarketSight LLC
Newton, MA
Ph. 617-582-3800 or 44-20-7993-2126
sales@marketsight.com
www.marketsight.com
Michael DeNitto, CEO
Software Title(s):
MarketSight[®]

MarketSight LLC is a global provider of Web-based software to the market research industry and is the developer of MarketSight[®], an intuitive data analysis platform for creating crosstabs, running statistical tests and creating interactive charts and dashboards. MarketSight supports all leading survey data formats, including SPSS, SAS, Triple-S and Excel, and provides industry-leading integration with PowerPoint and Excel. The MarketSight solution is 100% Web-based, enabling access and collaboration via all leading Web browsers. MarketSight includes comprehensive training and live telephone and e-mail support. Find out more at www.marketsight.com

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Dorking, United Kingdom
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sales@marisc.com
www.marisc.com
Allan Shaw
Software Title(s):
MARSC Community
MARSC.net

MDSS, Inc.
Marketing Decision Support Systems, Inc.
Indianapolis, IN
Ph. 800-870-6377
dale@mdssworld.com
www.mdssworld.com
Dale Pellman
Software Title(s):
Data Tailor
Research Tracker II
Research Tracker II for Medical Respondents

MediaAnalyzer Software & Research, Inc.
New York, NY
Ph. 212-209-3979
boyar@mediaanalyzer.com
www.mediaanalyzer.com
Charles Boyar, Vice President
Software Title(s):
AttentionTracking



Microtab, LLC
Cumming, GA
Ph. 770-778-1810
Larry.Hills@Microtab.com
www.microtab.com
Larry Hills, Managing Director
Software Title(s):
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ask@modernsurvey.com
www.modernsurvey.com
Software Title(s):
Heat
m360
mPerform
mResearch
mSpark
mThrive

MRDC Software (Thailand) Co., Ltd.
Chonburi, Thailand
Ph. 66-38-416867
narisa.t@mrdcsoftware.com
www.mrdcsoftware.com
Fern Thitisoonornluck
Software Title(s):
Beacon
DDR / DRM
MRDCL
QPSMR
Reflect
Survelytics



mTAB
Yorba Linda, CA
Ph. 800-693-3111 or 714-693-3110
mlummas@mtabsurveyanalysis.com
www.mtabsurveyanalysis.com
Mark Lummas, Sr. Director, Client Services
Software Title(s):
mTAB Research Analysis System

mTAB provides survey analysis and reporting services for Fortune 500 firms seeking to efficiently manage, analyze and report survey results. Founded in 1987, mTAB incorporates data processing, SaaS software, dashboard reporting and text analytics services into a comprehensive and turnkey survey analysis solution. mTab amplified the value of market research projects by enabling anyone within the enterprise to easily compare, combine and trend the results of past, present and future survey projects. mTAB's convenience and hands-on analytics will enhance your team's storytelling and understanding of your survey project results.

Multivariate Software, Inc.
Encino, CA
Ph. 818-906-0740 or 800-301-4456
sales@mvssoft.com
www.mvssoft.com
Software Title(s):
EQS Structural Equations Modeling
EQSIRT Item Response Theory

NCSS
Kaysville, UT
Ph. 801-546-0445
sales@ncss.com
www.ncss.com
Jerry Hintze
Software Title(s):
NCSS
PASS

Nearpod
Miami, FL
Ph. 305-770-0402
info@nearpod.com
www.nearpod.com
Ezequiel Lukin, Director
Software Title(s):
Nearpod

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nebu@nebu.com
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Software Title(s):
Dub InterViewer
Dub Knowledge

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Trumbull, CT
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Ian Roberts
Software Title(s):
Dub InterViewer
Dub Knowledge

New Age Media Systems, Inc.
New York, NY
Ph. 212-695-1590
steve@crosstab.com
www.crosstab.com
Steve Molkenthin
Software Title(s):
EzACCESS[™]
EzTAB[™]

Oakdale Engineering

Oakdale, PA
Ph. 724-693-0320
sales@curvefitting.com
www.curvefitting.com
Software Title(s):
DataFit/DataFit X

ObjectPlanet AS

0157 Oslo, Norway
Ph. 47-22-33-33-60
sales@support.objectplanet.com
www.objectplanet.com
Software Title(s):
Opinio

OfficeReports

2100 Copenhagen, Denmark
Ph. 45-3917-8300
tl@officereports.com
www.officereports.com
Software Title(s):
OfficeReports

**Opinionmeter International**

San Leandro, CA
Ph. 510-352-4943 or 888-OPMETER
sales@opinionmeter.com
www.opinionmeter.com
Morgan Strickland, President
Software Title(s):
Opinionmeter's SurveyManager, TouchPoint Mobile

Opinionmeter's enterprise-class survey platform provides the flexibility of authoring a survey once and distributing it anywhere - either as an online survey, mobile-Web (HTML5), mobile survey app, survey kiosk or scanned paper survey. The survey platform and survey apps can be white-labeled and fully branded. Opinionmeter's native survey apps support real-time or offline data capture. Opinionmeter's multichannel, cross-platform solution is extremely easy use, with rich feature-functionality suitable for the beginner or advanced enterprise user. Register for our free trial account today!

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www.osworld.com
John Harrison
Software Title(s):
FACTS

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Troy, NY
Ph. 800-327-8627
pbbsales@pb.com
www.pb.com/software
Software Title(s):
MapInfo Professional/MapX

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Horsham, PA
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www.pro-t-s.com
Tim Antoniewicz, VP, Business Development
Software Title(s):
PRO-T-S® Telephony Systems

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(See advertisement on p. 21)

Provalis Research

Montreal, QC, Canada
Ph. 514-899-1672
info@provalisresearch.com
www.provalisresearch.com
Software Title(s):
Italassi
MVSP
QDA Minder
Simstat
WordStat

Q Market Research Software

A Division of Numbers International Pty Ltd.
Glebe, NSW, Australia
Ph. 1-300-552-667 or 866-805-2419 (US)
sales@q-researchsoftware.com
www.q-researchsoftware.com
Matilda Sarah
Software Title(s):
Q Professional
web-Q

Q-FI Solutions

Toronto, ON, Canada
Ph. 416-640-7341 or 855-356-7341
romain@qfisolutions.com
www.qfisolutions.com
Software Title(s):
Q-FI

QPSMR Ltd.

Wallingford, Oxon, United Kingdom
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sales@qpsmr.ltd.uk
www.qpsmr.ltd.uk
Ros Biggs, Director
Software Title(s):
QPSMR CATI
QPSMR Command Language
QPSMR Companion
QPSMR Input
QPSMR Insight
QPSMR Reflect
QPSMR Solo

QQQ Software, Inc.

Arlington, VA
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www.qqqsoftware.com
Pamela Weeks, President
Software Title(s):
TPL Tables

QSR International (Americas) Ltd.

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www.qsrinternational.com
Rob Calcagni
Software Title(s):
NVivo
XSight

Qualtrics

Provo, UT
Ph. 801-374-6682 or 800-340-9194
sales@qualtrics.com
www.qualtrics.com
Software Title(s):
Qualtrics

QuestBack Group, Inc.

Bridgeport, CT
Ph. 203-690-1052
www.questback.com
Software Title(s):
Analytics and Reporting
Community and Portal
Mobile
Panel Database
Social Media Monitoring and Engagement
Survey and Data Collection

QuestionPro, Inc.

Seattle, WA
Ph. 800-531-0228 or 206-686-7070
sales@questionpro.com
www.questionpro.com
Aditya Bhat, Vice President of Sales
Software Title(s):
QuestionPro.com

QuestMetrics

Brunswick, VIC, Australia
Ph. 61-3-9912-1314
info@questmetrics.com
www.questmetrics.com
Jason Sobell
Software Title(s):
Insight Suite
Engage

Quick Tally Audience Response Systems, Inc.

Marina del Rey, CA
Ph. 310-306-4930
alanw@quicktally.com
www.quicktally.com
Alan Warshaw, President
Software Title(s):
Quick Tally

Raosoftware, Inc.

Seattle, WA
Ph. 800-787-8755 or 206-525-4025
raosoftware@raosoftware.com
www.raosoftware.com
Catherine McDole Rao, Vice President
Software Title(s):
Raosoftware InterForm
WebReport

RDA Group

Bloomfield Hills, MI
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fforkin@rdagroup.com
www.rdagroup.com
Frank Forkin
Software Title(s):
TabRight

ReadSoft, Inc.

Metairie, LA
Ph. 504-841-0100 or 888-READSOFT(T)
support-us@readsoft.com
www.readsoft.net
Software Title(s):
ReadSoft Documents for Forms

**Recollective (Ramius Corporation)**

Gatineau, QC, Canada
Ph. 613-230-3808 or 888-932-2299 x233
salessupport@ramius.net
www.recollective.com/professional
Stephen Thompson
Software Title(s):
Recollective Corporation

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Red Centre Software Pty Ltd
Upper Ferntree Gully, VIC, Australia
Ph. 61-4-1930-9158
sales@redcentresoftware.com
www.redcentresoftware.com
John Gwyther
Software Title(s):
Ruby COM
Ruby DESKTOP
Ruby LASER

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Research Metrics LLC
Toledo, OH
Ph. 800-600-0699 or 419-469-5535
sales@researchmetrics.com
www.researchmetrics.com
Todd Carnahan, Market Development Manager
Software Title(s):
MobiAudit
Shopmetrics
Surveo

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scott.wyatt@researchreporter.com
www.researchreporter.com
Daryl Maloney McCall, Co-Founder
Software Title(s):
Research Reporter

Rogator AG
90411 Nuremberg, Germany
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info@rogator.de
www.rogator.de
Software Title(s):
Software G3 plus

RONIN Corporation
Princeton, NJ
Ph. 609-452-0060
info@ronin.com
www.ronin.com/dc
Software Title(s):
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Dave Homer, President
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www.roymorgan.com
Portia Morgan, VP-Business Development
Software Title(s):
ASTEROID
ASTEROIDSearch

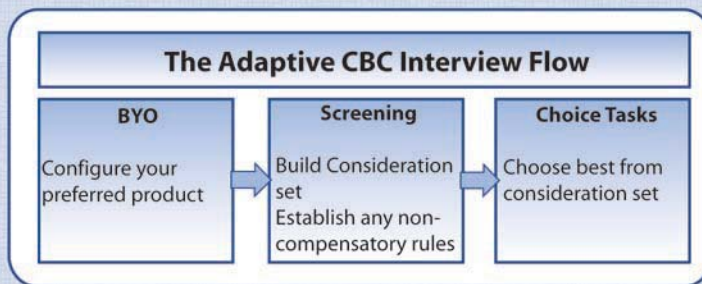
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Dortmund, Germany
Ph. 49-231-56-483-00
oliver.bischof@run-e.com
www.run-e.com
Oliver Bischof
Software Title(s):
SampleMakerSM
ProjectSuite (PS)

Salford Systems
San Diego, CA
Ph. 619-543-8880
info@salford-systems.com
www.salford-systems.com
Software Title(s):
CART® Decision Trees
MARS® nonlinear regression
RandomForests®
SPM Salford Predictive Modeler
TreeNet® Boosted Tree Ensembles

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sales@sammdata.com
www.sammdata.com
Bob Schweitzer
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support@sawtoothsoftware.com
www.sawtoothsoftware.com
Brian McEwan, Director of Client Services

Software Title(s):

ACA System
ACBC System
CBC System
CCEA System
CVA System
Discover
MaxDiff/Web
Menu-based Choice
SSI Web

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Sawtooth Technologies, Inc.

Northbrook, IL
Ph. 847-239-7300
joe@sawtooth.com
www.sawtooth.com
Joseph Curry
Software Title(s):
Sensus Web
WinCATI
WinCATI Mixed Mode

Smart Munk

Aachen, Germany
Ph. 49-241-97828-203
monika.mosthaf@smartmunk.com
www.smartmunk.com

Smart Software, Inc.

Belmont, MA
Ph. 617-489-2743 or 800-SMART-99
info@smartcorp.com
www.smartcorp.com
Software Title(s):
SmartForecasts®

SMI

SensoMotoric Instruments
Boston, MA
Ph. 617-557-0010
info@smivision.com
www.smivision.com
Software Title(s):
SMI Begaze
SMI Experiment Center
SMI Experiment Suite 360

SMP Research Software

Sydney, NSW, Australia
Ph. 61-2-9299-4666
jhughes@smpsurveys.com
smpsurveys.com/
John Hughes, Managing Director
Software Title(s):
SMP

**Snap Surveys, Ltd.**

Portsmouth, NH
Ph. 603-610-8700 or 800-997-SNAP (7627)
sales@snapsurveys.com
www.snapsurveys.com
Software Title(s):

Snap Mobile Anywhere (Apple iOS, Android, Windows)
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www.snapsurveys.com
Marianne Witts
Software Title(s):
Snap Survey Software

SQAD Inc.

Tarrytown, NY
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lfried@sqad.com
www.sqad.com
Larry Fried, V.P. Nat'l. Sales
Software Title(s):
DATAVue
Hispanic Spot TV Plus
NetCosts
Spot Radio
Spot TV
WebCosts
WRAP

**SSI**

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info@surveysampling.com
www.surveysampling.com/
Software Title(s):
QuickTake
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(See advertisement on p. 7)

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www.stata.com
Software Title(s):
Stata

StatGeneral

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Aaron Peterson, Sales
Software Title(s):
StatGeneral

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will@statisticalinnovations.com
www.statisticalinnovations.com
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www.statpac.com
David Walonick, President
Software Title(s):
Statistics Calculator
StatPac Survey Software

StatPoint Technologies, Inc.

Warrenton, VA
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info@statpoint.com
www.statgraphics.com/
Software Title(s):
Statbeans
Statgraphics Centurion XVI.I Bilingual
Statgraphics Centurion XVI.I Multilingual
Statgraphics Centurion XVI.I Professional
Statgraphics Online
Statgraphics Sigma Express
Statgraphics Web Services

StatSoft, Inc.

Tulsa, OK
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info@statsoft.com
www.statsoft.com
Kyra Matzdorf
Software Title(s):
STATISTICA

William Steinberg Consultants, Inc.

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Ph. 888-725-9392
info@notjustsurveys.com
www.notjustsurveys.com
William Steinberg, Ph.D., President
Software Title(s):
Survey Genie
Survey Genie - Gold
Survey Tools for Windows

Survey Analytics
 QuestionPro.com
 Seattle, WA
 Ph. 206-686-7070 or 800-326-5570
 gina.yeagley@surveyanalytics.com
 www.surveyanalytics.com
 Adi Bhat
Software Title(s):
 LifeMetrix
 SecondPrism
 Survey Analytics Enterprise Research Platform
 SurveyPocket
 SurveySwipe

SurveyConnect, Inc.
 Boulder, CO
 Ph. 303-449-2969
 info@surveyconnect.com
 www.surveyconnect.com
 Marcie Levine, President
Software Title(s):
 ActiveView 360
 ActiveView Express

www.SurveySquare.com
 Prairie Village, KS
 Ph. 913-712-9882
 salesrequest@surveysquare.com
 www.SurveySquare.com
 Jay Farr, Owner
Software Title(s):
 SurveySquare.com

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 www.surveywriter.com
 Joe Williams
Software Title(s):
 SurveyWriter

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 www.systat.com
Software Title(s):
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 info@tactician.com
 www.tactician.com
Software Title(s):
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 TacticianMarketOptimization
 TacticianMedia
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 TacticianOnline
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 a Confirmit Company
 Vancouver, BC, Canada
 Ph. 604-435-6007
 sales@techneos.com
 www.techneos.com
 Sean Conry
Software Title(s):
 SODA - Survey on Demand Application

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Software Title(s):
 Morae

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- Binomial test
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Toluna

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Toluna@toluna.com
www.toluna-group.com/
Software Title(s):
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www.unclegroup.com
Ken Hartley, President
Software Title(s):
UNCLE Professional
UNCLE Reports
UNCLE Standard
Usort

Viking Software Solutions

A Div. of Phoenix Software International
Tulsa, OK
Ph. 918-491-6144
sales@vikingsoft.com
www.vikingsoft.com
Software Title(s):
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VDE
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Vision Critical

Vancouver, BC, Canada
Ph. 604-647-1980
info@visioncritical.com
www.visioncritical.com
Software Title(s):
Vision Critical Insight Communities Software Suite

VisionsLive Limited

London, United Kingdom
Ph. 866-412-0154 (US/Canada) or 44-207-788-7821 (UK)
andrew.hall@visionslive.com
www.visionslive.com
Software Title(s):
Bulletin Boards 2.0
In-Depth Interviews
Online Focus Groups 2.0
Remote Screen View
SpeakSurveys



VOXAPP

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ritesh@voxapp.com
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Madhu Sudhan, CEO
Software Title(s):
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Vincent Auger, Vice President of Sales
Software Title(s):
Acuity4 Survey
Panel Manager
Pronto
Semeon
STAT XP Web
Voxco Command Center
Voxco Insight Publisher (V.I.P.)

Weeks Computing Services

London, United Kingdom
Ph. 44-20-7831-0574
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www.weekscomputing.com
Tony Weeks, Partner
Software Title(s):
U-Tab™

Jan Werner Data Processing

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www.jwdp.com
Jan Werner, Principal
Software Title(s):
QBAL
QGEN
QTAB

Westat

Rockville, MD
Ph. 301-251-1500
marketing@westat.com
www.westat.com
Software Title(s):
Blaise

WorkLine Research

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workline@workline.ru
www.workline.ru
Software Title(s):
5LP™
A-cube™
Loyalty Mixed Assessment™

WRC Research Systems, Inc.

Downers Grove, IL
Ph. 630-969-4374
sales@wrcresearch.com
www.wrcresearch.com
William Cantrall, President
Software Title(s):
Brand Profiler
BrandMap
BrandTrend
BrandTrend XL
WRC Explorer

Your Perceptions, Inc.

Boulder, CO
Ph. 720-565-9051
info@yourperceptions.com
www.yourperceptions.com
Jim Zigarelli, President
Software Title(s):
Eval Builder
i-wantin™
POV2000™
QWRITERII for Windows
YP121™

Audience Response Software

Eval Builder, Your Perceptions, Inc., p. 90
 Nearpod, Nearpod, p. 85
 Perception Analyzer, Dialsmith - Perception Analyzer, p. 83
 Quick Tally, Quick Tally Audience Response Systems, Inc., p. 86
 Reply, Fleetwood Group, Inc., p. 83

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(Personal and self-service survey software)

ACA System, Sawtooth Software, Inc., p. 88
ACBC System, Sawtooth Software, Inc., p. 88
ARCS[®], ARCS[®], p. 80
 askiaface, ASKIA - Software for Surveys (New York), p. 81
 askiafacemobile, ASKIA - Software for Surveys (New York), p. 81
CBC System, Sawtooth Software, Inc., p. 88
 Clipstream[®] Video Cloud, Clipstream[®] Survey, p. 82
 Confrimit Horizons, Confrimit, p. 82
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 Eform, Beach Tech Corporation, p. 81
 FACTS, Optimum Solutions Corp., p. 86
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 icanmakeitbetter.com, icanmakeitbetter, p. 84
 iSURVEY – Offline data collection for iOS, Contact Software Limited (Harvest Your Data), p. 82
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 Panel Database, QuestBack Group, Inc., p. 86
PanelPortal[™], Toluna, p. 90
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 Q-FI, Q-FI Solutions, p. 86
 QPSMR CATI, QPSMR Ltd., p. 86
 QPSMR Input, QPSMR Ltd., p. 86
 QPSMR Insight, QPSMR Ltd., p. 86
QualBoard Mobile[™], 20|20 Technology, p. 90
 Raosoft InterForm, Raosoft, Inc., p. 86
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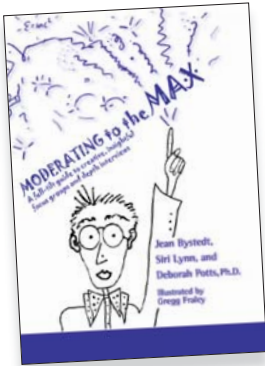
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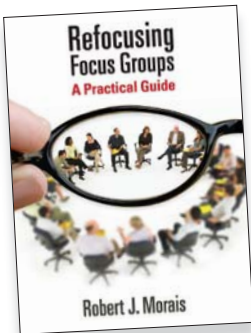
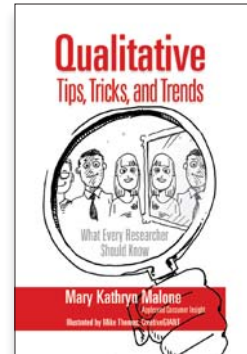
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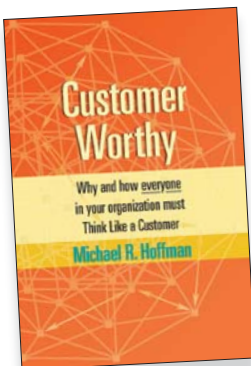
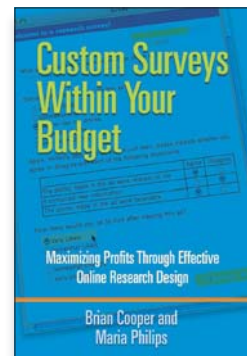
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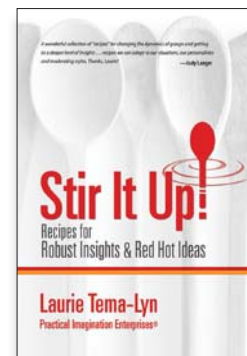
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BEFORE YOU GO ●●● issue highlights and parting words

●●● cover-to-cover Facts, figures and insights from this month's issue

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Inside the home, fixed-location speakers are beginning to redefine the traditional home stereo system.

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Other industries have been tackling the screen-size problem for a while now and it is time for ours to join the party.

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To this end, it was concluded that the push-notification method was superior to the e-mail method.

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It is advised to provide incentives at stages: at app installation; following completion of the first patient case; and after the desired number of cases has been submitted.

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Wellness to Millennials is about more than not getting sick; it's about all the facets of life and how they are connected.



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●●● advertising research

Communicus studied the role of advertising and non-advertising influences in driving purchase intent for key brands, including Apple, Samsung, Windows, Amazon and LG, all of which had recent advertising campaigns in-market.

●●● health care research

Kevin Kelly reports on a study on accountable care, its continued evolution and its impact on the relationship between providers, payers and pharmaceutical, biotechnology and medical device manufacturers.



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