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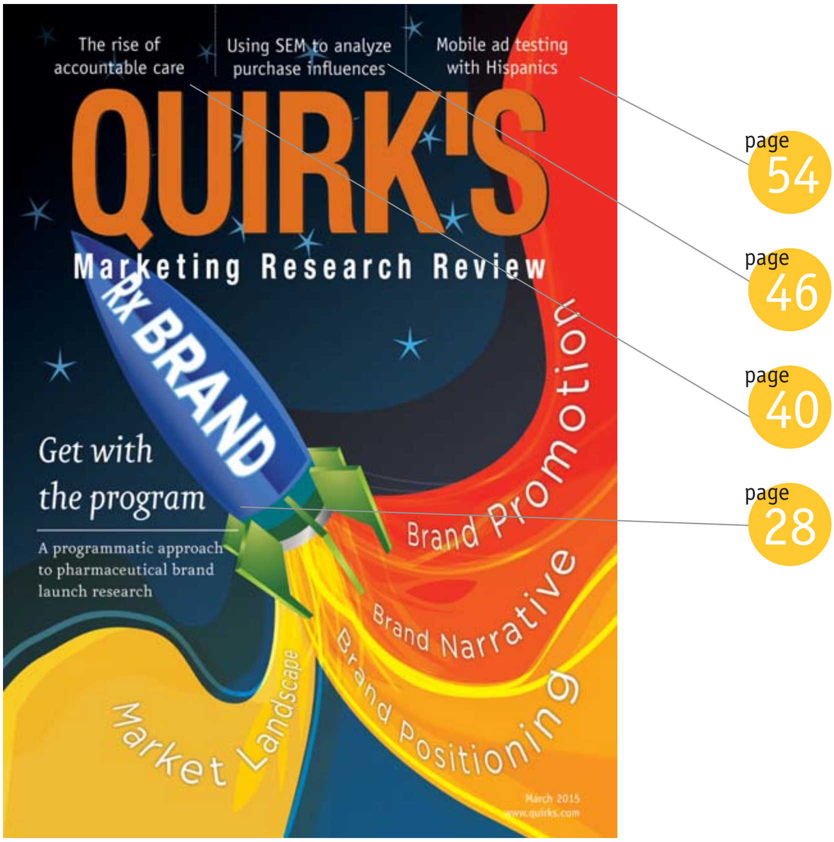

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••• social media research

Pinterest grows its male user base

As reported by Re/code's Kurt Wagner, Pinterest says the total number of men on the site doubled in 2014, and its male user base in the U.S. grew 73 percent last year. Stereotypical male categories like "Cars & Motorcycles," "Men's Fashion" and "Geek" more than doubled since 2013 in terms of total pins saved from other sites or repinned within the platform.

Pinterest doesn't share an active user count as other social sites like Facebook and Twitter do. Instead, the company points to comScore data, which lists Pinterest's active users at 70 million, up from 48 million in 2013.

The company says a third of all new signups last year were men, meaning that there are roughly 15 million men actively using the service worldwide. According to a *Wall Street Journal* article, Pinterest's user base is still 71 percent female.

The social network is, however, trying to raise its appeal for men. It updated its search tool so that people can now filter by gender (show me pins posted by men/women). It's also beefing up its ad game, so men should soon see more targeted and relevant ads on the service moving forward.

So why does Pinterest care so much about male users? In a word: growth. If the site is viewed as female-only, it has alienated roughly half of its potential user base. Pinterest is looking to increase its ad load, and that requires more users to advertise to. "We have a vision to be a discovery engine," a company spokesperson told Re/code. "While Pinterest got its start among lifestyle categories in the U.S., it's grown to reach all types of demographics, especially as it grows outside of the U.S."

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••• technology research

Millennials making time for smartwatches

There is robust interest among Millennials in purchasing a smartwatch, according to Multi-sponsor Surveys Inc., Princeton, N.J. Almost four in 10 (36 percent) Millennials express some interest in buying a smartwatch in the next 12 months and 13 percent express strong interest. Interest drops successively among each age cohort, down to a low of 7 percent interest among the oldest age group – matures (age 65+).

Purchase interest is also far higher among minority groups, such as Hispanics and African-Americans, and among adults who currently wear a watch, as might be expected. These findings are part of Multi-sponsor's 2014 Watch Brand Index Tracking Study.

While Millennials express the most interest in buying a smartwatch, the majority of adults, across all age groups, are aware of the new wearable technology. Knowing something about them is a different matter, however. Again, Millennials are the most knowledgeable about smartwatches, having gleaned information from advertising, seeing them in stores, knowing someone who owns one or from doing their own research. Millennials are also much more aware of brands of these new "computerized wristwatches" than older adults.

By Joseph Rydholm, Quirk's Editor

CASRO debuts Safe Harbor program

Joe Rydholm can be reached at joe@quirks.com

In late December, CASRO announced the launch of its Safe Harbor program, which is aimed at supporting CASRO member self-certification to the Department of Commerce's Safe Harbor Framework in compliance with the EU Directive on Data Protection.

As described on the CASRO Web site, as an independent recourse mechanism providing third-party dispute resolution and enforcement services, CASRO will work with participating members to confirm that their privacy policies meet Department of Commerce requirements to participate in the Safe Harbor and that their adherence is properly documented. CASRO will also provide an independent, online complaint-handling service, in conjunction with the Council of Better Business Bureaus, free of charge to E.U. and Swiss residents.

The U.S.-EU and U.S.-Swiss Safe Harbor Frameworks provide a method for U.S. companies to transfer personal data that originates in the European Union and Switzerland in a way that is consistent with the EU Data Protection Directive.

Research entities that receive personal data about EU citizens must be in compliance with the EU directive on data protection and one way to show compliance is to self-certify with the U.S. Department of Commerce that the business adheres to the seven Safe Harbor Privacy Principles:

1. Notice: notify individuals about the collection of their personal data.
2. Choice: give them choices regarding certain uses of their personal data.
3. Data integrity: ensure the accuracy and integrity of their personal data.
4. Access: allow access, and if necessary, correction of their personal data.
5. Security: protect the security of their personal data.
6. Onward transfer: comply with restrictions on further transfers of their personal data.
7. Enforcement: provide an independent dispute resolution mechanism for privacy complaints concerning European personal data that is collected, received or processed.

quirks.com/articles/2015/20150302

* * *

To find out a bit more about the program, I checked in via e-mail with Abby Devine, director of government and public affairs at CASRO.

What were some of the reasons behind the creation of the Safe Harbor Program?

Devine: CASRO wants to help the research industry be a model of compliance with trans-national privacy laws. Adherence to the Safe Harbor Privacy Principles is already required by the CASRO Code and, by stepping into the dispute-resolution space with the BBB, CASRO is able to offer a necessary service to our members at a reduced cost.

Why should U.S. marketing research firms be concerned about safeguarding respondent data privacy?

Safeguarding respondent data and maintaining trust with respondents is the crux of our industry and should be a priority for all research companies. Failure to take proper steps maintain data privacy exposes you to legal ramifications and detracts from your appeal as a business partner.

What are the advantages for research firms of self-certifying?

Any research company that receives personal data from Europe must comply with the EU Data Protection Directive and, for most companies, self-certification to the Safe Harbor Framework is the simplest way to assert compliance with the Directive. It can be a competitive advantage if your company is self-certified and ready to handle European data and your competitor is not and has to either self-certify or work through the cumbersome process of complying with the Directive in another manner prior to handling European data.

What kind of changes, if any, do you foresee happening in the U.S. on the data privacy front?

Europe has, and will likely continue to be more privacy focused than the U.S. but that is not to say that privacy won't continue to receive increased attention in the U.S. in 2015.

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••• health care research

A boom in Boomer health care spending

IRI predicts $230 billion by 2020

It's no surprise that health and wellness are important to Boomers and seniors. However, this doesn't mean that they are only purchasing prescription medications and shopping for the typical health care products. Like all consumers, mature consumers are investing in healthier living today to maximize long-term health care expenditures. As a result, "healthier for you" has emerged as a significant opportunity across CPG aisles, according to Aging America: Carving Out Growth in Mature Markets, a report from Chicago researcher IRI.

"By 2020, annual CPG spending by Boomers and seniors will surpass $230 billion," says Susan Viamari, editor of Thought Leadership, IRI. "Health care-related spending represents a significant share of overall CPG spending for mature shoppers, so it is crucial for CPG marketers to focus on proactive wellness and disease-state management to activate these shoppers. With this type of spending on the table, even a fraction of one share point can easily translate into hundreds of millions of dollars."

Thus, going forward, retailers and manufacturers must continue to look across the store for opportunities to support and advance consumers' wellness-related efforts, as the interest in these types of products is not limited to the health care aisles. In recent years, Dannon's Light & Fit Greek yogurt and L'Oreal's Advanced Haircare line, for example, have scored with consumers. And retailers are innovating to serve this market, too. Walgreens, for instance, partnered with GlaxoSmithKline to launch Sponsorship to Quit, a free online smoking cessation program.

Consumers are embracing proactive self-care because it's less costly to maintain good health today than it is to face chronic disease tomorrow. Aging consumers are investing disproportionately in a wide range of preventive care and simple health care solutions. Sales of products such as gastrointestinal liquid, home health care/kits, vitamins and internal analgesics are showing exceptional growth among the mature marketplace.

To protect and grow share in these related categories, marketers must not only understand the broad range of conditions that are prevalent and/or top-of-mind among older consumers but they also must educate consumers on the ingredients and products that can help them prevent and manage these diseases.

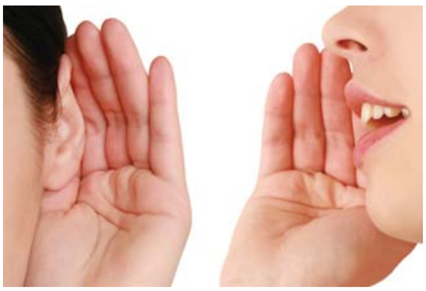
"It's important to remember that mature consumers want to achieve and maintain wellness but they are not interested in the latest fad," Viamari says. "When you have more than 9,500 new brands hitting retail shelves each year that are touting new ingredients and benefits, it can be overwhelming. That's why clear communication of product benefits, product uses and value is absolutely essential with these shoppers."

Older consumers still rely heavily on traditional media, such as circulars and coupons from home as well as signs or displays in stores when making brand decisions. However, marketers should

quirks.com/articles/2015/20150303

not rule out digital media. More than 27 million people over the age of 55 are engaged in social networking and nearly 71 percent of Boomers and 59 percent of seniors visit social networking sites daily.

To reach mature consumers effectively, marketers must leverage traditional media and supplement with new media programs that are tailored to target consumers' place on the technology adoption curve. "There's no question that the mature market is poised for significant growth," says Viamari. "The trick for marketers is to get a good grasp on the aspirations, challenges and attitudes that mark this unique and mature marketplace."
www.iriworldwide.com



••• social media research

Audience size determines how we share

Helping me vs. helping you

In a *Journal of Marketing Research* article ("Broadcasting and narrowcasting: how audience size affects what people share") Alixandra Barasch and Jonah Berger propose that one simple aspect of social media communication – the size of the audience – might contribute to self-focused behavior.

In a series of experiments, the authors tested the effects of audience size on the content participants shared. Barasch and Berger found that people naturally tend to focus on the self and communicating with many others (broadcasting) does little to discourage this egocentric orientation. As a result, broadcasting encourages self-presentation, leading people to avoid sharing content that makes them look bad (e.g., a story about choosing a bad product).

However, the authors found that one-on-one communication (narrowcasting) prompts people to shift their attention to the message recipient, making them care more about sharing something useful (e.g., information about discount concert tickets).

For example, in one study, the researchers randomly assigned people to have face-to-face conversations with either a single person or a small group, then examined the stories they told about a recent restaurant experience. People who broadcasted told less negative stories than those who narrowcasted. Broadcasters also used more self-focused words (e.g., I, me) and fewer other-focused words (e.g., you, your). In another study, the researchers found that people were more likely to share information about an upcoming sale when narrowcasting.

These findings can help explain why Facebook and Twitter seem so self-focused. Social media posts often address a large audience of "friends" or "followers," which may encourage disproportionate self-presentation.

"Broadcasting is unrepresentative of everyday life because people may avoid sharing things that make their lives look bad," note Barasch and Berger.

These results have implications for how firms can manage word-of-mouth by presenting consumers with opportunities to narrowcast or broadcast on their Web pages based on the type of product they sell. Companies that sell useful products (e.g., health care) should provide Web forms for narrow, personalized messages. Conversely, companies that sell products related to self-presentation (e.g., designer clothing) should provide one-click posting onto social media.

••• technology research

Connected devices gaining in popularity

IoT is right for me

Consumer adoption of network-connected technology is on the rise, with 69 percent of consumers planning to buy an in-home device in the next five years, according to Accenture Interactive's 2014 State of the Internet of Things Study. By the end of 2015, a total of about 13 percent of consumers will own an in-home IoT device such as a thermostat or in-home security camera. Currently, only about 4 percent of those surveyed own such a device.

Adoption of wearable IoT technology such as smartwatches and fitness devices is also expected to gradually increase, with nearly half of consumers already owning or planning to purchase a device in this category in the next five years. The study was conducted by Acquity Group, a digital marketing agency, now part of Accenture Interactive.

Wearable fitness devices will generate the most mass consumer adoption in the next year, with 22 percent of consumers already owning or planning to make a purchase by 2015. While findings reveal consumers are more likely in the next year to adopt connected devices that emphasize health and safety, they are most focused on how IoT products can provide integration to help them live more conveniently long-term.

Taking into account respondents who already own these products, the following connected devices are expected to be most popular over the next few years:

Wearable fitness devices (expected to have 22 percent adoption by 2015; expected to have 43 percent adoption in the next five years).

Smart thermostats (13 percent projected adoption in the next year; 43 percent in the next five years).

Connected security systems (11 percent adoption in the next year; 35 percent in the next five years).

Smart clothing and heads-up displays are expected to see the least overall adoption, with only 3 percent projected adoption in the next year, and 14 and 16 percent in the next five years.

The research reveals ownership will also extend from tech-savvy consumers to late adopters in the next five years. Both plan to purchase wearable and in-home IoT devices by 2019: 92 percent of those who considered themselves mass consumers on the adoption curve and 78 percent of late adopters say they'll purchase an in-home IoT device in the next five years; 45 percent of consumers and 26 percent of late adopters plan to purchase an in-home device in the next two years; 75 percent of consumers and 62 percent of late adopters say they'll purchase a wearable device in the next five years; 42 percent of consumers and 24 percent of late adopters plan to purchase a wearable device in the next two years.

"These digital devices present major opportunities for improving a brand's customer experience for a range of consumers," says Jay Dettling, president of Acquity Group. "Our data reveals that it's not only tech enthusiasts who are interested in these kinds of products but late adopters who also express interest in buying them."

More than twice as many men as women say they have heard of the IoT (nearly 19 percent versus just over 8 percent). The study indicates men are slightly farther ahead on the adoption curve than women, with men more likely to identify as early adopters: 53 percent of men plan to purchase wearable technology in the next five years, compared to 45 percent of women; however, when it comes to wearable fitness devices, women are slightly more likely to have already adopted than men (8 percent compared to 7 percent).

Men are more likely to plan to purchase an in-home IoT device, such as a smart refrigerator, in the next five years compared to women (70 percent compared to 67 percent). Younger consumers are most likely to adopt connected technologies later on, while older consumers are slightly more likely to already own certain products: 53 percent of Millennials (ages 18-25) plan to buy an in-home IoT technology device in the next five years, compared to 32 percent of Baby Boomers (over the age of 45). Thirty-six percent of Millennials plan to adopt wearable technology in the next five years compared to 25 percent of Baby Boomers. Forty-five percent of Baby Boomers plan to adopt a smart thermostat in the next five years, compared to 35 percent of Millennials. Fifty-nine percent of Generation X consumers (ages 26-35) plan to adopt wearable fitness technology in the next five years, compared to 47 percent of Millennials.

The findings of the nationwide study indicate that consumers living in the top 10 largest U.S. cities are more likely to identify as early adopters than the national average. Findings also varied by region: 74 percent of consumers living in the Northeast plan to adopt an in-home IoT device in the next five years, compared with 68 percent in the Midwest and 66 percent in the Southeast. Consumers living in the Northeast are approximately 50 percent more likely to adopt a smart smoke detector in the next year than those living in the Southeast and Midwest; 58 percent of consumers living in the Northeast plan to adopt wearable technology in the next five years, with the Southeast and Midwest close behind at 57 and 55 percent.

"The growth of these devices will have a major impact on customer experience innovation across industries," says Dettling. "Adoption of IoT technologies can provide digital businesses high-quality brand engagement opportunities with customers and drive more revenues."

The Acquity Group 2014 State of the Internet of Things Study surveyed more than 2,000 consumers across the United States to gain insight into their preferences for and barriers against use of the Internet of Things. Results were broken down based on demographics, including age, gender and location. www.accenture.com

••• financial services

Interest rising in mobile banking

Branches remain popular

Almost two-thirds (62 percent) of consumers have at least tried mobile banking, according to findings from the inaugural Bank of America Trends in Consumer Mobility Report, a study that explores broad mobile trends and banking behaviors among adult consumers across the country who own a smartphone and have an existing banking relationship. Of those who use their phones for banking, almost one-third (31 percent) say they log on at least once a day and four out of five (82 percent) access their accounts at least once a week or more.

When accessing a mobile banking app, the most common activities included monitoring account balances and statements, transferring funds and paying bills, as well as depositing checks via mobile check deposit.

But while mobile and online banking services are becoming more widely used, and in many cases are consumers' primary method of banking, visits to bank branches also remain high: 84 percent of respondents have visited a bank branch within the past six months. This is true among all the age groups polled, with nearly the same percentage of Millennials ages 18-34 (83 percent) saying they have visited a bank branch in the past six months as those ages 35 and older (85 percent).

However, just 23 percent of respondents say they complete the majority of their banking transactions at a branch. Nearly half (47 percent) turn to mobile or online as their preferred method.

Increasingly, consumers are using their mobile banking apps to perform more sophisticated transactions, such as mobile check deposit. According to the report, nearly six in 10 (58 percent) of those surveyed have used mobile check deposit, and nearly four in 10 (38 percent) use it frequently.

Consumers who say they do not use mobile check deposit cite lack of awareness as the chief reason: more than one-third (35 percent) are either not as familiar as they would like to be or are unsure how to use the feature. More than one in five surveyed (21 percent) prefer physically handing checks to a teller, and 27 percent report they just do not have any checks to deposit.

In other findings, if their phone is lost or stolen, consumers are just as concerned about losing their personal contacts (79 percent) as they are about identity/security information (79 percent). In the next two years, 60 percent of consumers would be comfortable with a fingerprint scan/swipe security feature to gain access to their mobile banking app. Nearly one-third expressed comfort with retina scans (32 percent) and voice recognition (33 percent).

••• lifestyle research

PayPal study examines how consumers view time

The weight of waiting

As part of its recent global rebranding, PayPal announced findings from a 15-country survey aimed to understand both universal human attitudes and country-specific variances in perspectives about time, technology, money and other central elements of what PayPal calls the People Economy, a descriptor for its belief that people's lives can and should be more connected, more human and filled with deeper meaning.

Seventy percent of the world thinks technology should make payments simpler, connected and faster, with more choices and opportunities. For example, in Singapore (73 percent), China (72 percent) and Australia (51 percent), the majority of people want technology to help them avoid long lines.

European shoppers are more fed up with having to wait for someone to take payment or having to get cash to complete a purchase, with Spain (55 percent), Italy and Russia (53 percent), France and Turkey (41 percent) and the U.K. (39 percent) reporting the highest levels of dissatisfaction.

The problems persist online as well; if a site requires a customer to sign up or register before making a purchase, they're apt to lose more than half of prospective sales in Italy (52 percent), Canada (51 percent) and Spain (50 percent).

Whether waiting in line/queuing to pay for things, commuting to and from work or sitting in traffic, enduring pointless meetings or calls or simply running through the day's errands, more than half of the world (56 percent) wastes hours each day that they'd like help recapturing. Only Germany has a significant percentage (19 percent) of its population that professes being highly efficient and wasting no time. By contrast, only 2 percent of Americans report feeling efficient.

For the rest of the world, getting to and from work and dealing with daily routines seem to be the biggest time-sucks, with every country averaging more than an hour on each. Italians, however, have the worst commutes, wasting more than two hours each day (123 minutes on average) followed closely by Israelis (117 minutes). Russians waste nearly three hours on errands each day (166 minutes), followed by Brazilians (125 minutes), Americans (118 minutes), the Chinese (115 minutes) and the Turks (112 minutes). In the U.S., being stuck in traffic and pointless meetings, taking calls and answering e-mails come in as a close, combined second for what time is wasted on (22 percent each).

While the fact that we waste time on the day's necessities may not be surprising, how each country would spend that time if given the chance varies from country to country. Of those wishing to spend more of that wasted time on worthwhile endeavors, Americans lead the world in ranking family time (54 percent) as the way they wish to spend more time, while the Japanese want to treat themselves with solitude (63 percent), the Chinese seek more physical activity (48 percent) and Spaniards want more time for leisure activities (35 percent).

While keys lead the list of things people won't leave the house without, the smartphone is just as important – beating cash and credit cards on a global scale. This statistic confirms for businesses that figuring out mobile payments is important to future sales. In fact, in some of the world's fastest-growing economies, the majority of the population has already embraced mobile payments. In China, 90 percent of respondents pay from their phone, followed by Russia (85 percent), Brazil (nearly 70 percent) and Turkey (60 percent). Even in China, however, where mobile is mainstream, 35 percent of respondents wish paying by phone were easier. The world is ripe for continued innovation.

In the U.S., 54 percent say that small local businesses like farmers markets and local shops can benefit from mobile or online payments and 49 percent believe American entrepreneurs overall would benefit from an easier flow of money.
www.peopleeconomy.com

••• shopper insights

Shoppers like tailored e-mails

Make it personal, please

As reported by Christine Kern of Integrated Solutions for Retailers, in an online survey administered by Harris Poll and sponsored by digital marketing technology and services provider Listrak, 80 percent of Americans who read promotional e-mails prefer it when retailers personalize their marketing e-mails based on a consumer's previous purchases.

The survey of more than 2,000 adults also found that 71 percent like it when retailers e-mail them based on online browsing behavior; 69 percent like retargeting ads showing them an item recently viewed on a merchant's Web site; and 67 percent like product recommendations on retailers' sites during their shopping visit.

"Contextual relevance is key when featuring personalized product recommendations," says Listrak CEO Ross Kramer. "Merchants must consider where shoppers are in their purchase journey when determining the personalized products to show, whether in different types of e-mail campaigns or on different pages of a retail Web site, and should make it clear to the shopper why particular products are being presented, as well.

"Shoppers are on-the-go and often time-challenged and the number and variety of products online can be daunting, so they truly value when a retailer shows its familiarity with their individual personal preferences, current interests and purchase history to present them with products they are mostly likely to be interested in and to want to purchase," Kramer says.

The study found that 72 percent open and read promotional e-mails from retailers and that 44 percent of Americans who open and read promotional e-mails from retailers get five or more e-mails per week from their favorite retailers; 21 percent receive nine or more weekly.

In contrast, when asked the maximum number of e-mails they find acceptable to receive weekly from a favorite retailer, only 21 percent respond five or more. Seventeen percent report that they don't have a maximum number and another 5 percent say they are unsure of the maximum number.

"Roughly the same number of shoppers who say between five and eight e-mails weekly is the maximum they find acceptable say they do not have a maximum or are unsure of how many are acceptable. We continue to see proven what shoppers in our 2014 Harris survey reported – subscribers' willingness to receive more e-mails corresponds directly to how relevant and personalized the e-mails are," Kramer says.
www.listrak.com

IN FOCUS

Product and Service Update

••• trends research

New book looks ahead to a digital future

'What happens when everything is digital?'

The Consumer Electronics Association, Arlington, Va., has released its third book, *Digital Destiny: How the New Age of Data Will Transform the Way We Work, Live and Communicate*. In it, author Shawn DuBravac, CEA's chief economist, explains why the world's mass adoption of digital technologies portends the beginning of a new era for humanity, one that will rival the invention of the printing press for its transformational effects on every person, country and institution in the world. "Most consumers perceive the digital age as simply the accumulation of sleeker and more powerful gadgets," said DuBravac in a press statement. "My aim is to answer the question, 'What happens when everything is digital?' I hope to broaden readers' views to include an understanding that in the not-so-distant future mankind will have thoroughly replaced analog for digital in every corner of our lives, and as a result everything from business to health care to travel and down to the foundation of culture itself is changed."
www.ce.org

quirks.com/articles/2015/20150304

••• ad research

Google adds DoubleClick tool

Watched or skipped over?

Google, San Francisco, has a new tool to report if a video ad delivered via DoubleClick ad services has been watched or skipped over. The viewability measurement is available to all marketers and publishers using the DoubleClick platform or the DoubleClick Ad Exchange. Google is utilizing the industry standard for video viewability of 50 percent of the video being on screen for two seconds or longer. The viewability reporting will soon expand to reserved inventory on YouTube and all of Google Preferred, across desktop and app views.

••• television research

Canvs tracks Twitter's response to TV shows

Traces shifts in emotion

New York advertising firm Mashwork has launched Canvs, a social TV analytics tool which analyzes Twitter postings about a TV show. Using a keyword and phrase database, Canvs searches for emotional reactions and sorts them into categories such as "terrible," "love," "beautiful," "clueless," etc. The summaries follow the timeline of the TV show, allowing analysts to trace shifts in emotion according to moments in the broadcast. The Canvs audience insights tab also provides ethnic, income, location, gender and age demographics. Mashwork is marketing its product entirely on the TV market, charging on a per-series rather than per-month basis.
www.mashwork.com

••• neuromarketing

HCD Research brings neuro MR to China

Aimed at CPG firms

HCD Research, Flemington, N.J., has launched its integrated Chinese-based cognitive and applied neuroscience market research services. The company is focusing on applications for CPG companies studying packaging, fragrance and flavor and other sensory research as well as testing communications including print, broadcast and online. HCD Research uses mobile neuroscience laboratories which can be used throughout the country and can collect data at malls, corporate facilities and market research/focus group facilities.
www.hcdi.net

••• ad research

Segmentation targets Japanese consumers

Product of Nielsen/INTAGE joint venture

New York researcher Nielsen and Japanese research firm INTAGE have formed a joint venture company, Nielsen-INTAGE DigitalMetrics, to develop cross-platform advertising effectiveness solutions. The new firm will utilize the Nielsen Online Campaign Ratings platform along with INTAGE's i-ssp consumer panel data to enable clients in Japan to analyze consumers by several segments such as brand ownership, purchase intent, lifestyle, residential area, age and gender, in addition to analyzing the impact of online advertising on purchase behavior and brand switching.
www.nielsen.com

••• media research

ComScore adds video measurement service

Tablet, OTT, smartphone

ComScore Inc., Reston, Va., announced the U.S. launch of Video Metrix Multi-Platform, which will provide unduplicated desktop, smartphone, tablet and over-the-top (OTT) video audience measurement for content owners, agencies and advertisers. This evolution of Video Metrix is designed to enable clients to sell, plan and buy digital video – at the video media property and show level – using TV-comparable metrics for both video content and advertising. Video Metrix Multi-Platform uses the methodology and inputs from Media Metrix Multi-Platform, Mobile Metrix and Video Metrix to deliver a single, unduplicated metric for digital video audiences across all platforms for those who participate in measurement. Video Metrix Multi-Platform is part of comScore's Total Video Initiative, which will ultimately account for all video viewing behavior across screens.
www.comscore.com

••• Briefly

■ The Media Rating Council, New York, has granted Meetrics accreditation for its Viewable Ad Impression measurement in its Ad Attention Monitor product, for both display and video ads.

■ Rentrak, a Portland, Ore., research company, was granted a patent for its software which detects and corrects TV viewership levels affected by missing or dropped set-top box information.

■ BrainJuicer Group PLC has launched the Global FeelMore50, a global ranking of world advertising, and has named "Oh Emma," made by Leo Burnett Paris for Le Trefle, a French bathroom tissue, as the top ad of 2014. Separately, the firm celebrated its 15th anniversary in January.
www.brainjuicer.com

■ Map publisher SpatialTEQ Inc., Lowell, Mass., has released MapBusinessOnline.com 4.4 business mapping software for sales, marketing and territory planning professionals in the U.S., Canada and the U.K. With MapBusinessOnline.com 4.4 MBO users can overlay vector layers of cities and roads on top of sales territory maps, demographic maps or business planning maps. In addition, 4.4 provides a series of enhanced account management tools controlling the setup of map editing teams and groups of annual subscribers interested in sharing map-editing capabilities.
www.mapbusinessonline.com

■ Salt Lake City researcher MaritzCX has been granted a patent by the U.S. Patent and Trademark Office for the technology underlying its Spotlight data mining tool.

■ Chicago research firm Technomic has launched Consumer4Sight, a suite of tools which tailor survey design methodology, sensory testing and qualitative research for the foodservice industry. It can examine taste preferences, attitudes, cravings, loyalty and other consumer influences.
www.technomic.com

■ Millward Brown Digital, New York, is partnering with Snapchat, Venice, Calif., to provide analysis of advertising campaigns on the Snapchat social media site. Snapchat has released two advertising formats, the "Brand Story" and the "Our Stories." Millward Brown Digital measured the first six advertising campaigns, using a behaviorally-representative group of users who were surveyed with an online panel before and after the campaigns were launched.
www.millwardbrown.com

■ TranslationCloud, New York, creator of the ConveyThis Web site and TranslateThis plugin, has released an updated version of each, with almost 15 additional languages included. Both platforms now offer 90 different languages, with Burmese, Sinhala, Kazakh, Chichewa and Uzbek added with this update.
www.conveythis.com

■ 42 market research, a Dubai health care specialist, has expand-

ed its panel coverage to include Singapore, Malaysia, Indonesia and the Philippines.
www.42mr.com

■ Twitter, San Francisco, has added mobile analytics to its iOS app, available through the detail page of any tweet. The analytics include information on impressions, engagement, the percentage of readers who favorited the tweet and the number visiting your profile through the tweet. Information on an Android version was not released.

■ Facebook has begun a soft launch of its long-rumored Facebook at Work product. The work-oriented version of Facebook provides messaging, groups, event planning and a work profile which can be kept apart from users' personal profiles. Free iOS and Android apps, simply called Work, are now available. Employers cannot access the product for their company, although they can request information via the Facebook Web site. Currently only specific companies have been invited to try the product, which is aimed at companies with 100 or more employees.

■ Google Translate has been updated in both its Android and iOS apps to include real-time voice and sign translation. The voice translation can be used between two people conversing in two languages, with each person talking in his own language and the app delivering text-based translations of each side in real time. The visual translation is activated when the user points the camera inside the app at a road sign, storefront, etc. The app then translates the writing on the sign into the desired language. Currently the instant translation only works for English to and from French, German, Italian, Portuguese, Russian and Spanish.

■ App Annie, London, has launched Usage Intelligence, a product providing app usage metrics, including active users, time spent, usage frequency and retention.
www.appannie.com

■ BirdEye, a Sunnyvale, Calif., firm specializing in online reputation management, has expanded its platform to include an enterprise analytics component. The tool uses natural language processing and machine learning to pull insights from customer feedback and also provides a dashboard offering reputation heat maps for locations or products.
http://birdeye.com

■ New York research firm Ipsos Innoquest has modified its concept testing procedures to allow surveys to be completed on a computer, smartphone or tablet and to utilize swipe technology. Its research found that consumers spent over 50 percent more time reading concepts in the new format than in the traditional one.
www.ipsos.com

■ London-based researcher Tonic Insight has released Tonic Express, a qualitative research platform that utilizes automated sampling and a template research design to reduce both time and cost.
www.tonicinsight.com

■ Reston, Va., researcher comScore has introduced Video Metrix Multi-Platform, designed to provide a single measure of video viewing across platforms, including desktop, smartphone and tablet. As part of the company's Total Video Initiative, it will provide clients with TV-comparable metrics for video content and advertising.
www.comscore.com

■ Lightspeed GMI, a Warren, N.J., research firm, has expanded its online respondent validation tool, Honesty Detector, to 27 markets across the Americans, EMEA and Asia Pacific. The product analyzes respondents' answers to identify dishonest panelists and is used both at the panel level and the study level.
www.lightspeedgmi.com

■ Point of Purchase Advertising International, Chicago, will launch the *Journal of Shopper Research*, previously known as the *Journal of Marketing at Retail*, in early 2015. The *Journal of Shopper Research* is a double-blind peer-reviewed journal, designed to stimulate and encourage research on marketing at retail and shopper marketing. Special themed issues are planned on benchmarking the shopping experience, omnichannel retailing and shopper analytics.
www.journalofshopperresearch.com

■ Summit, an online retail specialist in Hull, U.K., has launched a predictive analytics platform, Forecaster, developed by a team of statisticians led by David Wooff of Durham University. A feature of Forecaster is the wide scope of data and buying triggers considered, including weather, location, transaction history, available stock and television.
www.summit.co.uk

■ Innubu has updated its software platform for creating surveys which are engaging and easily shareable via e-mail or any social network. The tool includes analytic and segmentation tools. Creating and sharing a survey through the Innubu tool is free, with an unlimited number of responses and the option of an incentive sweepstakes.
http://innubu.com

■ Millward Brown and ZappiStore have launched LinkNow for TV, which allows brands to quickly assess the effectiveness of TV ads. LinkNow is designed to predict how well an ad will perform and allows companies to evaluate individual ads or to compare and choose between different options.
www.millwardbrown.com

Consumers + companies: partners in innovation

| By Julie Wittes Schlack

snapshot

A report on what Communispace and Hallmark Cards found when they examined how to innovate with differently-minded respondents.

quirks.com/articles/2015/20150305

Companies aspire to innovate, both internally and in collaboration with their customers. But despite all of the talk about innovation, there is remarkably little public conversation about the individual and group qualities required to spark and implement it. Is innovation imposed by solitary and driven geniuses like Steve Jobs? Or is it more likely to be fueled by hundreds of thousands of passionate brand fans populating e-suggestion boxes? Are innovators right-brained, out-of-the-box-thinking creative artists or systematic left-brained thinkers able to spot the gaps in existing processes or product suites?

In partnership with our clients at Hallmark Cards, we set out to explore these questions, with the goal of helping ourselves and our clients become more self-aware and effective in how they both partner with consumers and interpret what they're hearing from them.

Predictably, the answer is more nuanced than any of these stereotypes would suggest. According to Idea Connection Systems Inc., there are 12 unique orientations drawn from multiple aspects of mental functioning that affect how we prefer to approach innovation: how people think (cognitive), take instinctive action (conative) and meet their personal relational needs (affective). They've developed an assessment, the Strengths Preference Indicator (SPI), which measures two complementary elements:

- Your Innovation Orientation (IO), which indicates where along the innovation continuum you're innately predisposed to work, from evolutionary (incremental) at one end, to revolutionary (breakthrough) at the other.
- Your Innovation Orientation Modifiers (IOM), which provide insight into your behavioral approach to innovation – how you seek information, make decisions, get energized, work with others and take action.

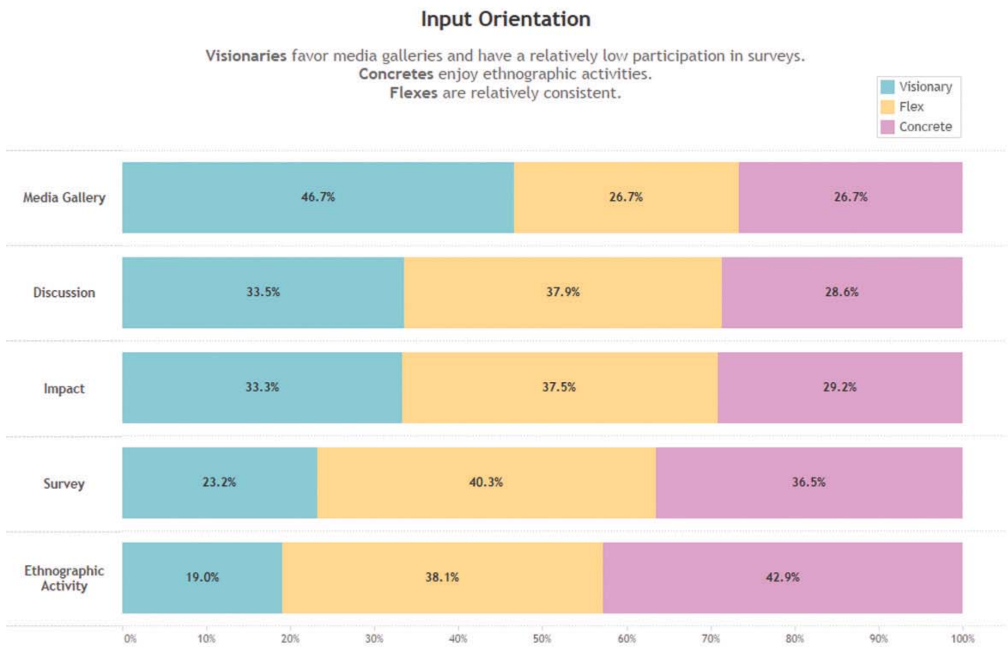
Management at Hallmark – a greeting-card and media company populated by a high proportion of artists, writers and other creative professionals – has embraced the SPI as a means of enhancing internal teams in a business operation that depends on continuous innovation. But Nancy Cox, the consumer understanding and insight manager at Hallmark, wanted to turn her focus outward and systematically explore how the SPI profile of consumers in her private online community influenced:

- what types of activities they chose to participate in, as measured by an analysis of participation based on both activity type (e.g., survey, discussion, media gallery, etc.) and activity purpose (e.g., feedback, co-creation, etc.); and
- the product input and feedback that they offered, as measured by classifying the type of language they used (e.g., aesthetic, other-oriented, operational, etc.).

To answer those questions, we invited members to take the SPI survey, then populated their member profiles with their orientation attributes. We were then able to use those attributes as cut variables in analyzing the data.

Clear patterns

Though working with a relatively small sample of members (175) and a limited set of activities (25), some clear patterns emerged in people's preferences. For example, cognitively concrete thinkers – people



who tend to focus on sensory and quantifiable information, to accrue details in order to incrementally build towards the big picture – participate heavily in mobile diary activities. This makes sense, given that the structure of Communispace's On–the-Go mobile app mirrors that approach, enabling users to submit a series of detailed entries that provide, in aggregate, a coherent portrait of a time period or aspect of life. In contrast, visionary thinkers – people who value seeing the entire forest before focusing on the trees and are motivated by their imaginative vision of what could be – seem to favor media galleries and participate less in surveys than do other SPI types (Figure 1).

By the same token, builders – people who are methodical, precise, more concerned with solving problems than with finding them and who seek solutions in proven ways – favor surveys over other activity types. Clearly the defined scope and generally closed-ended nature of survey questions appeals to their innovation orientation. In contrast, pioneers – fluid, unconventional thinkers who redefine problems by questioning existing assumptions, think tangentially and tend to take control in unstructured situations – are over-represented in media galleries, most notably one in which members were invited to share their own do-it-yourself creations and solutions.

These findings provide more evidence for what we empirically know, which is that it's crucial to provide consumers with multiple modes of participation. Surveys alone, while scalable, fail to tap into the full breadth and dimension of self-expression and innovation.

Our analysis of the kinds of language different types of people use when providing feedback on concepts reinforces this principle. We looked at members' feedback in 10 separate surveys, each of which asked the same basic questions about various products' probable usage and appeal (or lack thereof). With the help of a text analytics tool called Luminoso, we classified the language used in people's responses as aesthetic (pretty, ugly, etc.), emotional (love, hate, etc.), other-oriented (my kids, my husband, etc.), envisioning (imagine, visualize, etc.) and/or operational (construct, fix, repair, etc.).

While we found some correlations between the types of language used and SPI orientation attributes (such as the propensity of pioneers to use envisioning language in some surveys), we saw much less differentiation than in our analysis of participation by activity type. Aesthetic and emotional language prevailed across the board, followed by other-oriented language. While envisioning and operational language was used up to 29 percent of the time in some surveys, people essentially responded to pictures of products and questions about appeal with language reflecting how those products looked and how they felt about them.

We get what we ask for

The moral? When conducting research, we get what we ask for. Generic feedback-seeking surveys are likely to yield largely aesthetic and emotional responses. If we want to elicit more information about how people imagine actually assembling, using or maintaining products, we need to ask questions in a different, more explicit way. Or better still, we should employ other types of interactions – such as in-home usage testing, image annotations and brainstorms – to elicit a more diverse set of responses.

Because she and we believe that research should have impact, Hallmark's Nancy Cox is putting these findings to work. "These results will inspire us to use a broader range of tools and techniques when engaging our consumers," she says, "and stop trying to accomplish everything in a single survey." But she doesn't stop there. "As importantly, these results remind us that our own profiles influence what we choose to listen to. Embracing diversity will keep us honest but we have to recognize it first."

Spoken like a true visionary.

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pharmaceutical research

Get with the program

Evolving toward a programmatic approach to pharmaceutical brand launch research

| By Dan Callahan and Shirley Stoltenberg

snapshot

The authors provide a roadmap for programmatic market research to support pharmaceutical brand launches and discuss a diagnostic framework for customizing launch research programs to meet each brand's unique needs.

quirks.com/articles/2015/20150306

Quite often, the first six months after launch shape the long-term success of a pharmaceutical brand. Physicians' initial impressions of a brand can influence how and if they use the product in their practice and these early decisions often determine prescription patterns for years to come.

Pharmaceutical marketers are well aware that an effective launch can lay the groundwork for a blockbuster. Moreover, they are well aware that launch mistakes can haunt a brand forever. As a result, there is tremendous pressure on pharmaceutical marketers to establish a brand development process that effectively positions their product and drives rapid uptake.

Pharmaceutical market researchers play an integral role in the success or failure of a new brand. One recent study estimates that pharmaceutical companies spend an average of $4.3 million on market research during Phase 3 to support a new brand launch[1]. Although research spending varies widely depending on the company and the product, it is clear that market research is a critical cornerstone to the launch process.

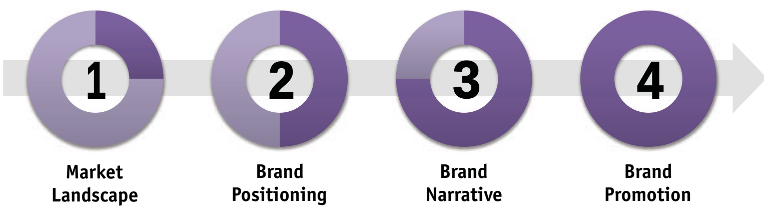
Watched pharmaceutical researchers evolve

In working with multiple pharmaceutical launches over the past 10 years, we have observed an interesting trend in how organizations manage the launch research process. During this time, we have watched pharmaceutical market researchers evolve from a tactical, project-oriented approach to a strategic, programmatic approach.

In the past, pharmaceutical market researchers typically followed a project-oriented approach in which they supported each step in the brand launch process with an individual, discrete research project. There was relatively little effort to synthesize insights across multiple

Figure 1

Roadmap for Programmatic Brand Launch Research



projects and researchers often worked with multiple research vendors. Pharmaceutical researchers were often focused on executing tactical projects and there was relatively little thought about how each project fit into the overall launch strategy.

Today, some pharmaceutical researchers are evolving toward a more programmatic approach to brand launch. In this new paradigm, market researchers proactively design a multiyear, multiphase program to support key marketing decisions across the entire launch process. Researchers are increasingly partnering with a single vendor, which can provide a more integrated design that synthesizes insights across research phases. Ultimately, this programmatic approach has enabled pharmaceutical researchers to fulfill a more strategic role in the brand launch process.

This evolution is still in its nascent stages. Although some pharmaceutical researchers have fully embraced this programmatic philosophy, many still adhere to more of a project-oriented approach. Based on our experience with several launch brands, we feel that programmatic thinking leads to superior research outcomes.

Common research process

In working with clients who employ a programmatic approach to brand launch, we've identified a common research process. This process typically starts in the middle- to late-stages of Phase 3 development when the company has solid hypotheses about clinical trial outcomes. These companies often start their brand launch research many months or even years before having final data from Phase 3 trials.

Figure 1 outlines the typical four-step process that drives programmatic launch research. In the sections below, we will examine each of these steps in detail.

Phase 1: Market landscape

Successful launch research programs typically begin with an exploratory phase to understand the defining features within the market landscape. This phase provides the brand team with foundational market insights and helps to ensure that brand strategy is grounded in market realities. This phase also enables the team to understand what products their brand is (and isn't) competing against.

At the conclusion of this initial phase, market researchers should be able to provide the brand team with insights into the three key questions:

- Algorithm: Where does the product fit in the treatment algorithm and what other therapies would a physician or patient consider?
- Unmet needs: What are the biggest frustrations that physicians and patients have with current therapies? Where are the biggest gaps in the current armamentarium?
- Differentiators: What are the product's unique differentiators compared to other therapies within the competitive set?

In our experience, the most successful approach to this initial phase can combine many tools in a market researcher's methodological arsenal, including both qualitative and quantitative research methods. On the qualitative side, ethnography is invaluable to understand how patients and physicians use current products and to develop a deep understanding of their therapeutic needs. On the quantitative side, perceptual mapping is a useful tool to plot current therapies against key product attributes and identify advantageous gaps in the marketplace.

Phase 2: Brand positioning

With a solid understanding of the market landscape, the researcher is prepared to tackle the next step: identify the optimal positioning for the brand. This phase defines the portion of the market that the brand can own and informs strategies for establishing that ownership.

Too often, we see pharmaceutical companies take a horse-race approach to positioning research: They create three to five positioning statements, field a survey designed to pick a winner and determine their brand positioning based on popular opinion.

It's important to remind ourselves that brand positioning is strategic and multidimensional; as such, a single opinion poll does not constitute effective positioning research.

Instead, the most effective researchers break brand positioning into its component parts and design discrete research projects focused on optimizing each of those parts. This deconstruction approach enables researchers to provide insights into several critical questions:

- Target audience: Which physicians and patients are most likely to benefit from the product? What specific demographic, psychographic or clinical attributes define the target audience?
- Value prop: What is the benefit that patients derive from using the product? What is the emotional benefit that physicians achieve by providing that benefit to patients?
- Brand character: How should patients and physicians feel when they interact with the brand? What is the brand's personality?

Throughout this process, it is important to optimize brand positioning at both a rational and an emotional level. As marketers, we all know that latent emotions play a critical role in product decisions. However, pharmaceutical brand positioning is often overly clinical and fails to connect with the emotional needs of patients and physicians.

In our experience, the most successful research programs utilize methodologies that identify latent emotional needs. For instance, when conducting target audience research, it's often important to design segmentation surveys that profile both therapeutic and emotional needs. Similarly, when conducting value-prop research, it's often important to include laddering exercises that explore the emotional benefits of each value proposition.

Phase 3: Brand narrative

Storytelling is the essence of good marketing. After identifying the ideal positioning for the brand, it's critical to create a brand narrative that provides context, color and details that bring the brand to life.

Creating an effective brand narrative is especially challenging in today's health care environment and marketers must strike a balance between two competing forces. On one hand, patients and physicians are bombarded by hundreds of brand impressions every day and pharmaceutical brand stories must be simple and succinct. On the other hand, health care can quite literally be a matter of life and death and pharmaceutical brand stories must be comprehensive so that patients and physicians can make a fully-informed decision.

As marketers navigate these competing needs, research insights are a precious resource in constructing a successful brand narrative. During this phase of the process, market research provides insights into the following questions:

- Prioritization: Which clinical messages are most important for physicians to feel comfortable prescribing and for patients to feel comfortable using the product?
- FAQs: What questions or concerns will physicians and patients have about the product? What information is most effective in overcoming potential usage barriers?
- Story flow: In what order should brand messages be presented in order to create a logical narrative for physicians and patients?

In most instances, the biggest challenge in creating a brand narrative is not determining what to say, it's determining what not to say. In most instances, marketers have hundreds of clinical trial data points and the daunting task of creating a simple story that can be conveyed in a succinct message.

In this context, it is critical for market researchers to offer methods that help the brand team to prioritize messages. Quantitative trade-off methods such as max-diff can be especially helpful to identify high-impact messages from a long list of potential messages. Qualitative trade-off methods such sorting exercises are a critical complement to quantitative research. This combination of qualitative and quantitative methods is especially powerful: Quant identifies which messages are most compelling, while qual provides insight about why those messages are compelling.

Phase 4: Brand promotion

As the brand team nears launch, their focus shifts to increasingly tactical questions about message execution. Once the team has a brand story, it then needs a storyteller. During this phase of the process, market research enables the team to optimize execution of the brand narrative.

Brand promotion research is typically more important for physician marketing than for patient marketing. On the physician side, the marketing team must rely on individual salespeople to bring the brand narrative to life. As such, the marketing team can lose control of the brand story if there is not strong coordination with the sales team. On the patient side, there is relatively little direct sales and the marketing team typically has more control of the narrative.

The physician sales force is typically the most important channel for pharmaceutical marketing and brand promotion research is often focused on optimizing the sales detail. In our experience, it is often helpful to separate sales detail research into two distinct steps:

- Optimize the sales collateral used during the detail. The insights from this first step are used to shape the detail aid itself.
- Optimize the talking points delivered by the sales rep. The insights from this second step are used to shape the implementation guide used during sales training.

Although brand promotion research is often focused on optimizing the sales detail, the physician sales force is only one of many promotional channels. Other important channels to address in research include:

- Speaker programs: Optimizing the presentation materials and the talking points used in peer-to-peer channels.
- Journal ads: Optimizing the imagery and copy used in physician journal ads to ensure the message is unique and compelling.

Figure 2

Pharmaceutical Brand Diagnostic

Competitive Context	Target Audience	Brand Character	Unique Differentiator
First-in-Class	Primary Care	Functional	Efficacy
Next Generation	Specialist	Emotional	Safety
Established Class	Patient		Convenience
			Cost

- Direct-to-consumer: Optimizing direct-to-patient campaigns delivered through television, print and digital channels.

Customize the launch research

Thus far, we have outlined a high-level approach for pharmaceutical brand launch research and we hope that this provides a general roadmap. However, we acknowledge that no brand is the same and it's important to customize the launch research to meet the unique needs of each brand.

In this vein, we have developed a simple framework (Figure 2) for understanding various brand archetypes and designing custom launch research programs accordingly. This framework analyzes the research needs for pharmaceutical brand archetypes across four key dimensions.

Dimension 1: Competitive context

Pharmaceutical brands generally fall into one of three categories in terms of their competitive context and it is important to design research programs accordingly:

First-in-class: Brands that are the

first in an entirely new therapeutic class face the challenge of educating the market and assuaging concerns about a new mechanism of action. Market landscape and market education research is especially important for this type of brand.

Next generation: Brands that offer a significant improvement within an existing class often face fewer challenges than first-in-class products. As such, foundational market landscape research is typically less important for this type of brand.

Established class: Brands that are new entry in a mature therapeutic class face the challenge of differentiating themselves within a commoditized class. For this type of brand, it is especially important for research to identify a singular benefit that differentiates the product.

Dimension 2: Target audience

Pharmaceutical brands vary in their target audience. Although most brands will focus on several audiences, it's important for the brand team to prioritize their target audience:

Primary care-centric: Some brands focus their messaging on primary care physicians. This type of brand typically has a broad indication that affects a large group of patients (e.g., diabetes, hypertension, dyslipidemia).

Specialist-centric: Some brands focus their messaging on a particular medical specialty. These are typically products intended to treat more advanced disease, products with potentially severe side effects or products with a niche indication.

Patient-centric: Some brands focus their messaging to communicate directly to patients. This typically occurs in mature, commoditized therapeutic areas where products have few major side effects and relatively few differentiating features.

Although it is often important to seek input from all of these audiences before launch, research budgets typically do not allow a deep dive into all of these segments. As such, it is critical for market researchers to focus their research dollars on understanding the needs of high-priority audiences.

Dimension 3: Brand character

Pharmaceutical brand communications fall on a broad spectrum from highly functional to highly emotional. Some brands have a more functional brand character that appeals on a more clinical level; other brands have a more aspirational brand character that appeals on a more emotional level.

Pharmaceutical brands typically fall into one of these categories:

Functional brands: Some products are indicated for life-threatening or acute conditions. The messaging for these brands tends to focus on patients' clinical needs and the brand personality tends to be more functional.

Emotional brands: Some products have indications intended to improve patients' quality of life. The messaging for these brands tend to focus on patients' lifestyle needs and the brand personality for these products tends to be more emotional in nature.

In designing brand launch research programs, it is important for market researchers to understand hypotheses about the brand character and select methodologies accordingly. Some research methodologies, such as rating or ranking exercises, are more rational activities and are ideal for more functional brands. Other research methodologies, such as projective exercises, are more emotional techniques and are ideal for aspirational brands.

Dimension 4: Unique differentiator

When differentiating a brand from the competitive set, it is important for the brand team to develop hypotheses about its key differentiator early in the launch process. In general, pharmaceutical brands differentiate themselves in one of four areas:

- Efficacy: Improved efficacy or better long-term outcomes.
- Safety: Fewer side effects or improved tolerability.
- Convenience: Easier for patients to administer.
- Cost: Less expensive for patients or payers.

Market researchers must understand hypotheses about brand differentiators and design research methods to understand unmet needs around them. Once the brand team has clearly identified its key unique attribute, market research plays a critical role in bringing it to life.

Litany of challenges

Today's pharmaceutical researcher is faced with a litany of challenges that are rapidly changing the role of market research: big data, data privacy, constrained budgets. Despite these challenges, market researchers must continue to provide actionable insights and demonstrate their strategic value.

Brand launch presents a unique opportunity for market researchers to demonstrate strategic leadership within their organizations. The decisions made during this launch phase will determine the success or failure of the brand and researchers have a unique opportunity to influence these critical decisions.

Embracing a more programmatic approach to launch research allows pharmaceutical market researchers to position themselves as a strategic partner in the brand launch process. Rather than delivering individual projects to meet tactical needs, this programmatic approach allows researchers to meet strategic needs.

As researchers evolve toward this more programmatic approach, we hope that the launch research roadmap and brand diagnostics outlined here will help to accelerate pharma researchers in becoming strategic leaders within their organizations.

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quirks.com/articles/2015/20150307

pharmaceutical research

Up, up and (hopefully) away

10 key activities in measuring and communicating pharma product launch excellence

| By David Hanlon

snapshot

From setting your KPIs to finding suitable benchmarks, David Hanlon lays out 10 things to do to track the ascent of a new pharma product.

In the current economic climate, where pharmaceutical company profits are declining, it is essential that new product launches achieve their full potential. Key to achieving launch success is being able to measure and communicate this success both internally and externally. Tracking a new product launch is an iterative process of measuring, managing and monitoring key performance indicators (KPIs) for the market and both your and your competitors' brands within it.

Here are 10 key, integrated activities that are important in measuring performance and communicating launch excellence in the pharma industry.

1. Getting your market definition right

In today's marketplace, communication of launch success drives motivation internally and investor confidence externally. The fate of a company's share price can rest on the spin put on new product uptake. Therefore, market


Physicians
Healthcare Professionals
Healthcare Opinion Leaders
Healthcare Decision Makers
Payers
The best respondents for your research, every time.
From access to fieldwork and everything in between
recknerhealthcare.com
reckner healthcare
The industry's most trusted healthcare fieldwork provider for more than 20 years.

Research Company Spotlight - Pharmaceutical Companies

Below is a list of firms from our Researcher SourceBook™ specializing in research for pharmaceutical companies

Adelphi Research
215-489-9200
www.adelphiresearchus.com

Ascribe
513-241-9112
www.goascribe.com

B2B International
914-761-1909
www.b2binternational.com

Blackstone Group
312-419-0400
www.bgglobal.com

Blueocean Market Intelligence
425-615-7474
www.blueoceanmi.com

Burke, Incorporated » SEE AD p. 5
800-688-2674
www.burke.com

Camille Carlin Qualitative Research, LLC
914-332-8647

Campbell-Communications, Inc.
718-671-6989
www.campbell-communications.com

Centrac
703-654-1400
www.verisconsulting.com/centrac

Clarity Pharma Research
864-579-2115
https://www.claritypharma.com/

CMS Research
419-843-8570
www.cmsresearch.com

Creative Waves Research
914-747-8086
www.creativewavesresearch.com

Directions In Research, Inc.
800-676-5883
www.diresearch.com

DLG Research & Marketing Solutions
713-795-5503
www.dlgresearch.com

DoctorDirectory.com, Inc. » SEE AD p. 41
828-255-0012
http://clients.doctordirectory.com

The Dominion Group, Inc.
703-234-2360
www.thedominiongrp.com

FCP Research
412-279-5900
www.fcpresearch.com

First Insights
312-455-0088
www.firstinsights.com

First Insights
212-926-3700
www.firstinsights.com

Focus Latino
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definitions (i.e., patient types, indications, competitors, etc.) are key.

The pharma marketplace can be split into two segments: the static repeat prescribing segment and the dynamic segment (new initiation, switch, add-in, etc.). In communicating launch success, the most appropriate share figure that describes the competitive set of brands must be quoted.

Consider defining the market using the following parameters:

- prescribing dynamics – new, add-in, switch and repeat prescriptions, which are particularly important in chronic diseases;
- indications and patient types;
- line of therapy;
- competitive set – brands only or brands and generics;
- physician specialty.

Therefore, for example, communicating a 25 percent share of the dynamic market (new, switch or add-in) in severe psoriasis patients for dermatologists is much better than a 3 percent share of the total psoriasis market (to include repeat prescriptions and all specialties).

2. Identifying your audience

Increasingly, pharma companies are targeting specific groups of physicians (specific specialties, high prescribers or those with a special interest in a therapy area). This can affect measuring the success of a new product's uptake and the research approach used (i.e., whether free-found samples or target lists of GPs, specialists or other HCPs) to measure the effectiveness of your launch campaign, so ensuring that you are targeting the appropriate audience is important.

3. Setting your KPIs

Jan Leschly, ex-CEO of SmithKline Beecham and former professional tennis player, once famously said, "If you don't keep the score, you're just practicing." In other words, it is essential to have KPI measures in place that will help you monitor the success of a new product launch. These should closely match your market definitions, form the basis for internal goals and include standard rational ATU measures of prescribing dynamics such as awareness, percentage uptake, growth, new/repeat/switched prescriptions and assessment of product attributes.

However, companies are focusing more on prescribers and their emotional engagement and are including additional measures to capture their affinity toward new brands and the diseases they treat. Getting these right is key in measuring, managing and monitoring a successful launch and for later measurement of brand equity.

4. Finding suitable benchmarks, norms and analogues

Two important questions to be able to

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answer are "How will I know if the new product launch is successful?" and "How realistic are our expectations for brand performance?" It is imperative that realistic benchmarks are used so that future launch goals are challenging but not impossible to attain.

One of the caveats regarding use of benchmarks is that they tend to be based on average levels of uptake across a range of products, therapy areas and specialties, which may not be reflective of the marketplace being examined and thus can act as only a rough approximation of what constitutes a measure of success.

Much of the primary benchmark data available are based on different measures and it is important to clarify the market definitions used. Benchmark data can be subject to bias due to market definitions as outlined above and variations in sampling (i.e., free found/random sampling versus target lists versus various recruitment/screening criteria and time scales of the data). Therefore, any internal or external benchmarks must be scrutinized to understand variations in the measurements, depending on the criteria used.

An alternative is finding suitable analogues from sales data by which to compare and measure uptake but there are always objections to looking outside of the product class or using other therapy areas as surrogates. Finding an identical scenario is rare, so companies have to be more open-minded in their comparisons with other product launches. As with benchmark data they are subject to the same caveats in terms of market definitions.

5. Setting launch goals: carrot or stick?

Goal-setting is a highly sensitive and political exercise; left to their own devices, people tend not to set themselves difficult-to-achieve targets. It is imperative to determine realistic ambition levels that agree with local, regional and global headquarters' goals. Therefore, finding good benchmark data or new product launch analogues to help set these targets is key.

Once the benchmarks are in place, it is necessary to review them in light of performance goals set for the brand and the sales/marketing teams. Some flexibility in performance levels is needed as they will vary widely by country.

There also need to be a change in mind-sets with success levels being set as motivations rather than barriers to be breached. More qualitative terminology when comparing cross-country performance, such as bronze, silver, gold and platinum levels of success or traffic-light systems, are useful rather than focusing too much on just the number/percentage penetration or growth, although ultimately these are important.

Goal-setting over time can be easily constructed by applying different rates of uptake curves to reach a desired endpoint at a specific point in time (i.e., peak share). Again, these can be based on benchmarks/analogues and adapted to measure success across your main KPIs and built into management dashboards to track performance.

6. Deciding when to measure

The timings of measuring the success of a new product launch depend on the primary and secondary data sources, frequency of measuring required, type of product, sales force size and visit frequency.

Many secondary data sources are available, although there can be a lag between measurement and when the data is available. For secondary data sources, detailed breakdown of prescribing tends to be very general as they are built for the syndicated market and hence may not cover all KPIs. More often than not a customized or ad hoc market research approach is used so that company-specific KPIs and questions can be incorporated.

Ideally the following timings are used to monitor launch: one to two months pre-launch and usually one, three, six, nine and 12 months post-launch. Decisions can be made as to when to include a full market analysis or at certain intervals concentrate on monitoring some of the more important KPIs – i.e., a "full brand health" check at major points, with smaller temperature checks in between.

7. Managing timing

In any new product launch upper management is impatient; they will be eager to see progress and from Day 1 will be asking to see data. Measuring primary market research must be fast and accurate. Due to lag periods between the research and results one must be clear in defining time periods when communicating results. Timings must also be clear and realistic to help manage expectations but as fast as possible.

Timelines also must be synchronized with sales rep force sizes, frequency of visits and coverage of audience so that, for example, measures at three months cover 75 percent of the target audience and 95 percent at six months.

8. Communicating success

The market is changing with respect to deliverables. Large tomes of data are no longer acceptable and straightforward, easy-to-read management dashboards or scorecards to help make quick decisions are essential as upper management no longer have the time to wade through acres of information.

These bring into play the benchmarks, goals and performance KPIs so that management can easily see whether the launch campaign is over- or underachieving expectations.

9. Avoiding missed opportunities

Measuring, monitoring and managing a new product launch must be action-oriented. What is the good of producing market feedback if no further action is taken to help understand both negatives and positives that can be addressed or reinforced?

Opportunities are often missed in terms of follow-up. More in-depth qualitative interviews with customers help better understand the issues that arise and what they see as benefits, as there may be a mismatch of messages or messages may not be credible, may not be getting across or may be considered irrelevant.

10. Gauging competitor response

Often, the excitement of a new product launch focuses many of the launch activities internally and tailors communications toward customer needs and reactions. It is all too easy to neglect competitor response in terms of their reaction toward a new product launch regarding their counter-communications of competing benefits, reactions to your campaign and any new areas or change in focus for their product communication.

The 3Ms – measuring, managing and monitoring – are key in communicating the success of a launch campaign and following these 10 key steps will go a long way to ensuring a new product reaches its full launch potential and it will be "All systems go" rather than "Houston, we have a problem."

Based in the U.K., David Hanlon is group director, Kantar Health. He can be reached at david.hanlon@kantarhealth.com.

health care research

Partnering for the future

The rise and importance of accountable care organizations

| By Kevin M. Kelly and Christina Rife

snapshot

Why health care manufacturers should formulate strategies for better interaction with other key health care stakeholders by understanding the accountable care market.

With the implementation of the Patient Protection and Affordable Care Act of 2010 (PPACA), the concepts of accountable care and value-based health care have become a central focus for health care providers. As the U.S. health care system moves away from long-standing fee-for-service practices and embraces a pay-for-performance approach (value-based health care), so too does the relationship between providers (physicians and nurses as well as hospital and health systems executives) and health care manufacturers – whether pharmaceutical, biotechnology or medical device companies. But what is accountable care and what should manufacturers know in order to compete in the new health care landscape?

The term "accountable care" has adopted multiple meanings over the past several years. In their truest intended form, accountable care organizations (ACOs) were established under PPACA to optimize the Medicare Shared Savings Program in an effort to contain costs generated via Medicare Part A and Part B. As a catchphrase, accountable care has come to represent a new health care dynamic of risk-sharing, value-based health care and overall population health management – at a most fundamental level, holding providers accountable for overall quality of care and for the outcomes of that care. The principles of accountable care are codified by the Centers for Medicare and Medicaid Services (CMS) in what is known as the Triple Aim – improving the individual experience of care; improving the health of populations; and reducing the per capita costs of health care. While introduced by CMS and initially impacting only reimbursement for Medicare claims, the principles of the Triple Aim have been adopted and implemented beyond Medicare or CMS ACOs and are now inherent to risk models employed by so-called "commercial" ACOs as well as to integrated health care as a whole.

Relationships and opportunities

Our firm, HRA, recently completed an extensive study on accountable care, its continued evolution and the impact it is having on the relationship between providers, payers and

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pharmaceutical, biotechnology and medical device manufacturers. Fundamental to a full understanding of the accountable care landscape are the distinctions between the needs of CMS and commercial ACOs, the relationships and opportunities for partnership between ACOs and the health care industry and the ever-changing and important role of commercial payers in accountable care.

An appreciation of the nuances of each of these components could unlock significant opportunity for health care manufacturers to gain a competitive advantage through better targeting of these important segments. Marketing and sales operations within pharmaceutical, biotechnology and medical device companies must develop a better understanding of ACO structures and unmet needs in order to establish more effective programs, more compelling interactions and a better linkage of product efficacy to the outcomes that matter most to ACOs.

Manage and coordinate

By definition, an ACO is a group of providers of services or suppliers that work together to manage and coordinate care for a defined population. CMS-certified ACOs have been approved by the Centers for Medicare and Medicaid Services to provide this level of care for Medicare fee-for-service beneficiaries. Commercial ACOs are those in which a commercial payer partners with providers (physicians, hospitals, home health care services, etc.) to leverage the same general principles defined by CMS in order to promote better quality, more coordinated care with financial benefits and/or penalties associated with adherence to set guidelines – but for patients covered under commercial health care plans.

On the surface, central differences between CMS and commercial ACOs include the identity of the end payer, the specific quality metrics enacted by each group and the defined levels of risk-sharing that apply across each segment. For the CMS ACO, the risk/reward component centers specifically on the Medicare population – failure to provide positive outcomes from care carry the risk of unreimbursed Medicare expenses on the part of the provider. Commercial ACOs, on the other hand, have the backing of a commercial payer and, given the nuances of the commercial payer world, have far more variation in terms of the quality requirements and related payment thresholds.

HRA's study reveals that the two main changes expected for the ACO models are increased risk-sharing for CMS ACOs and the vast expansion of commercial ACOs. From a CMS ACO perspective, as comfort with the model requirements increases, so does the ACO's likelihood to increase risk from the traditional one-sided model (where ACOs are rewarded for adherence to the Triple Aim but they are not penalized for failure to meet quality-of-care goals) to a two-sided model where both risk and reward are shared between the ACO and CMS and passing along the increased risk to pharmaceutical, biotechnology and medical device manufacturers. In fact, 2017 represents a pivotal year for CMS ACOs; by law, the majority of one-sided contracts will expire, forcing these organizations into two-sided risk-sharing with CMS or dissolving the ACO. Among commercial ACOs, the market will see significant expansion as major insurers such as Aetna, Blue Cross, UnitedHealth

Figure 1

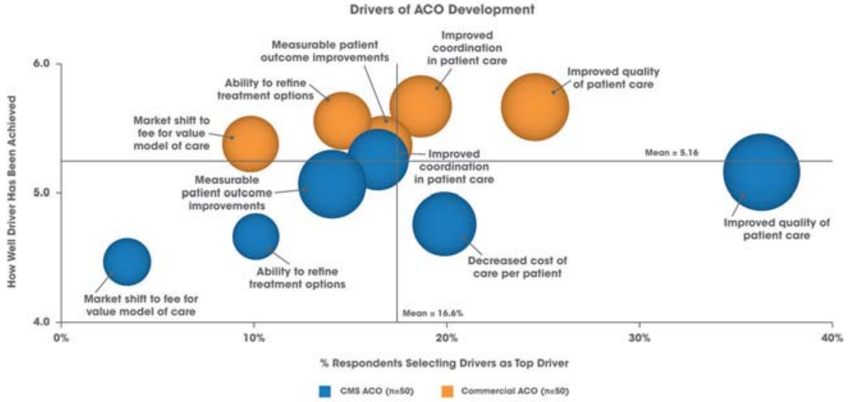


Figure 2

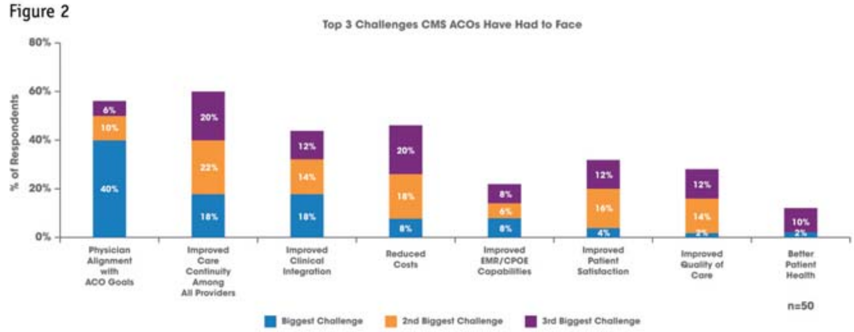
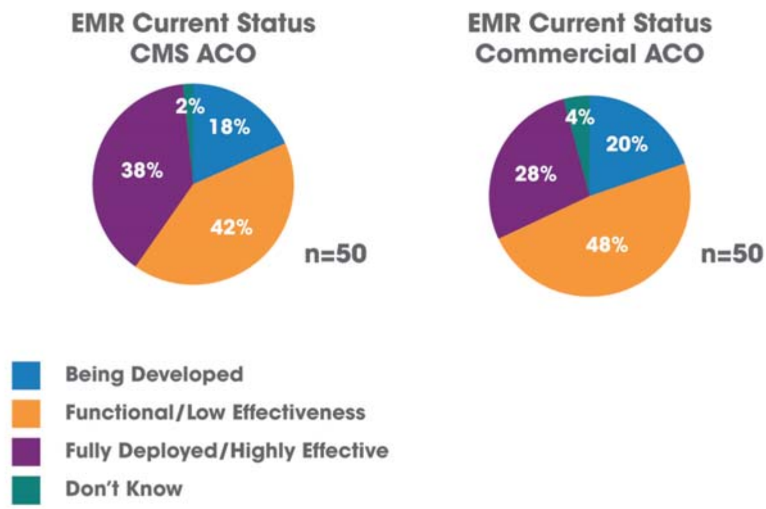


Figure 3



and Cigna increase their ACO presence and penetration. In addition, risk-sharing contracts between ACOs and pharmaceutical manufacturers – once purely hypothetical – are becoming a reality, with 8 percent of CMS ACOs sharing risk with manufacturers and 4 percent of commercial ACOs doing the same.

With expansion and change come expanded need-gaps and new opportunities for health care manufacturers to engage with these organizations. The need to improve patient outcomes is a common concern for both ACO types in light of their specific requirements. Further, the challenges of shifting toward value-based reimbursement creates areas of opportunity within both ACO types – although commercial ACOs, grounded and guided by a business direction, are farther along in their evolution CMS ACOs in these areas (see Figure 1). Though specific needs will vary among ACOs, these opportunities may include help with patient access to information, integration and ease of access to computer physician order entry systems (CPOE) or support for discharge programs.

Figure 4

What Manufacturers Should Improve to Meet ACO Needs

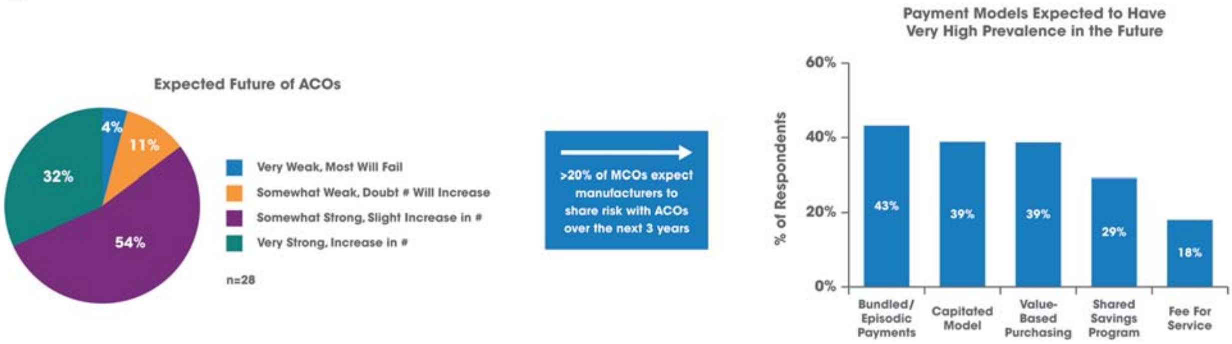
	CMS ACO (n=50) [A]	Commercial ACO (n=50) [B]
Understanding how ACO works	44%	30%
Changing the high pricing structure	28%	40%
Being competitive with pricing	24%	58%^{A}
Providing more education programs and training	24%	18%
Providing more reimbursement specialist support	22%	40%^{A}
Visiting more frequently	20%	20%
Visiting the correct departments/managers	16%	24%
Providing more information about products	12%	34%
Providing more services from pharmaceutical reps	10%	36%^{A}

Alters the traditional paradigm

The shift from fee-for-service to value-based health care reimbursement inherent to the ACO model alters the traditional paradigm under which health care manufacturers have operated for decades. As such, manufacturers must adjust their strategies as well as their tactical approaches in order to be in successful partnerships with the ACO customer.

HRA's research reveals that aligning practitioners under the goals of the ACO remains a key challenge for CMS ACOs, while commercial ACOs seek to improve clinical integration (see Figure 2). As such, the CMS ACO maintains a higher priority for pharmaceutical and other health care manufacturers to understand how the ACO functions and the consequent rules of engagement that exist (see Figure 4). Alignment of the ACO members under an integrated, electronic health records system is paramount to the successful

Figure 5



coordination of care that ACOs require – yet neither the CMS ACOs nor the commercial ACOs are satisfied with their progress on this front (see Figure 3).

Philosophically aligned by the overarching need to mitigate financial risk, ACOs seek greater levels of risk-sharing from their manufacturer partners – to see a level of commitment to patient outcomes by having some "skin in the game." Product benefits can no longer be presented in a silo; their overall value needs to be outlined in the larger context of improving population health and aiding outcomes to meet established quality metrics relevant to the specific ACO. This has become highly relevant with regard to pharmaceutical products used in the management of critical population health concerns, including cardiovascular, metabolic and respiratory diseases. Accountability among patients in managing their own health – especially in the areas mentioned above – also becomes critical to ACO success and the definition of value is intrinsically tied to their ability to contribute to positive patient outcomes by fostering greater adherence and compliance. Commercial ACOs, in particular, seek better pricing, the support of reimbursement specialists and more services from pharmaceutical companies – suggesting that gaps indeed exist and they are looking for help (see Figure 4).

As ACOs evolve and encounter persistent and new challenges, so must health care manufacturers in responding to these challenges. New, low-hanging opportunities for partnership exist in the form of IT/big data support, patient engagement, risk-sharing and "bigger-picture" value; manufacturers that do it right will prosper in the new health care world.

With CMS leading the way toward accountable care, commercial payers were certain to follow. The universal shifting of risk, toward performance-based reimbursement, generates a new role for payers, who largely serve to provide greater structure in this new environment. More than half of payers in HRA's study are already risk-sharing with ACOs and the expectation is this trend will expand to relationships between health care manufacturers and ACOs. The payer prognosis for the ACO model is strong, with bundled, capitated and value-based reimbursement models becoming the norm (Figure 5). Moving forward, pharmaceutical companies should expect greater pressure from the payer sector to partner more closely with ACOs on addressing adherence/compliance problems, establishing comprehensive discharge programs to limit readmission and assistance in managing high-risk patients.

Cross-functional accountability

Indeed, accountable care is a catchphrase for the new health care dynamic. Success across stakeholders – physicians, payers, patients and health care manufacturers – demands a level of cross-functional accountability unprecedented in the United States health care system. Regardless of the future of the CMS Accountable Care Organization program, value-based health care and the pay-for-performance paradigm is the new reality. For providers, manufacturers and payers, there is no going back – quality is here to stay. The pharmaceutical, bio-tech or medical device manufacturer that can embrace the changing landscape, understand the unique needs of provider stakeholders and institutions, stay ahead of the evolution of the U.S. health care market and be perceived as a true partner by payers and providers alike will have a winning strategy in the end.

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advertising research

How do the pieces fit together?

Mapping the chain of influence on consumer choice

| By Jennifer Musil

snapshot

A case study example of campaigns for mobile devices from Apple and Samsung is used to show the value of including word of mouth and other non-advertising-based factors when assessing ROI.

With billions of dollars being spent annually on advertising by major U.S. advertisers, there is no question that advertising plays a vital role in building brands and influencing consumer choice. While this principle is widely accepted, nearly every advertiser is charged with quantifying the specific return on investment that advertising and integrated marketing communications generates for brands in-market. Further, marketers are pushed to optimize campaigns to achieve specific future performance metrics.

Retrospective or backward-looking advertising research approaches have long been the standard to understand how advertising works in-market and to provide insight into how to optimize future campaigns. Armed with post-campaign performance information and sales data, advertisers can determine the extent to which campaigns (and individual campaign elements) contributed (or failed to contribute) to sales outcomes.

However, there are many influences outside of advertising and other brand-generated content that influence consumer choice. These influences are growing in the age of instant connectivity to online reviews, "expert" opinions, product information and ease of word-of-mouth communication through a wide network of friends and family. Thus, for marketers to drive the strongest results on the bottom line, they need to understand how advertising interacts with other marketplace influences.

Once marketers understand the specific role of each potential influencer in driving demand, and the relationship between advertising and other influences, they can move from backward-looking assessment to more accurate forward-looking planning and prediction. Because advertising is the one variable where marketers retain the most control, the insights gained can be used in the planning phases for future campaign initiatives.

Questions to be addressed revolve around how a campaign can be optimized to:

- drive stronger demand (through looking at overall campaign changes and the messages/creative approaches utilized in different media venues);

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Big Data Shows Ad Quality is Key to Driving Sales Growth

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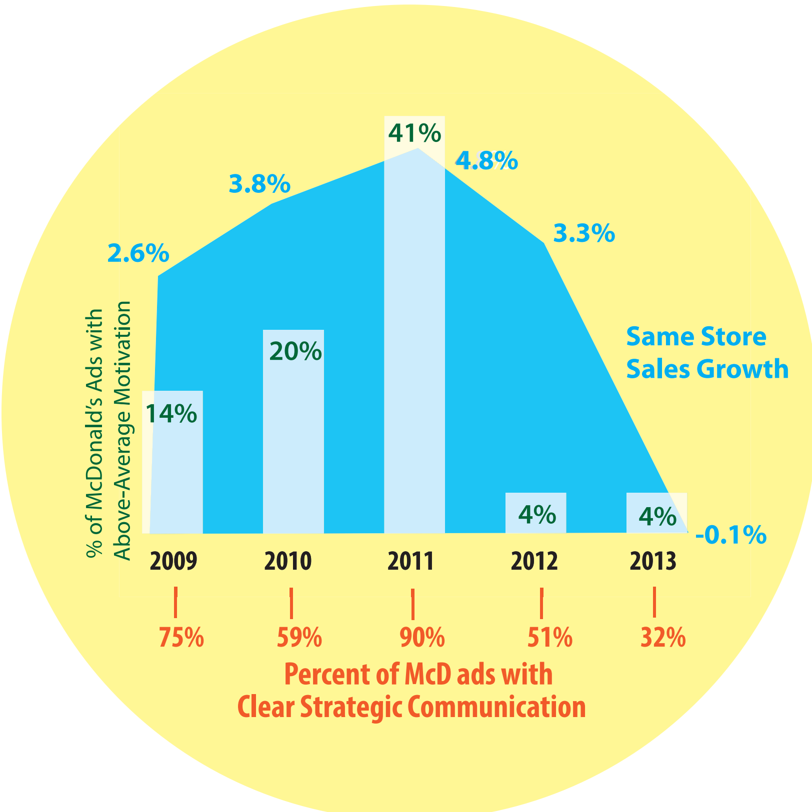


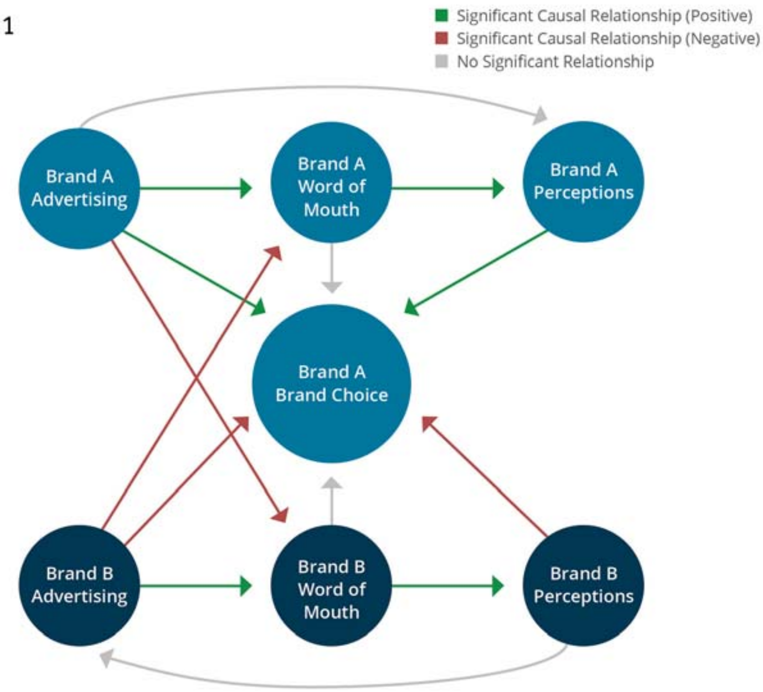
BIG DATA:
77 months of McDonald's Wall Street sales data; 441 McDonald's ads tested in the Ameritest pre-testing system; 1,500 competitive ads; 180,000 consumer interviews

NOTE: Not weighted by media spend.

• facilitate strong positive word-of-mouth dynamics via conversation, reviews, social media, etc.;
• perform best in light of competitive influences on consumer choice; and
• deliver the most persuasive messaging possible.

Once advertisers have a clear, quantitative snapshot of how all marketplace forces interact to influence demand, they can then move from the theoretical approach of understanding influences on consumer choice to using these models to quantitatively predict future demand. By quantifying the strength of each influence, these models allow for planning and development of what-if scenarios that can illuminate the path to building the strongest future demand for the brand via changes in the advertising campaign.

Figure 1



Mapping relationships

Structural equation modeling (SEM) is the analytic tool that creates a holistic view of marketplace forces on consumer choice by mapping relationships between various influences to ultimately predict future demand.

Our firm recently utilized these models within the mobile device industry to identify the role that advertising and non-advertising influences played in driving purchase intent for key brands, including Apple, Samsung, Windows, Amazon and LG, all of which had recent advertising campaigns in market. This study was designed to not only determine how recent campaigns drive purchase intent for each brand and the featured devices but to also highlight the full causal chain of influence on brand choice, including the role that word of mouth, preexisting perceptions and competitive actions play in effecting brand choice.

To develop the most robust models and ensure the most accurate analysis, the study was conducted longitudinally – that is, the same 628 adults were interviewed at two points in time. The first interview occurred prior to campaign launch for all brands and the second interview was conducted after each campaign had been in-market for several months. The use of the longitudinal design allows for a clear picture of how perceptions and purchase intent for each brand change over time and in relation to the specific combination of influences that each consumer was exposed to and/or engaged with. The potential influences included in this study were:

• video advertising (television and online video);
• digital advertising;
• sponsorships, promotions and brand integrations;
• social media engagement – brand-sponsored/generated;
• social media engagement – family/friends-generated comments and content;
• blog engagement;
• word of mouth – the opinions of family or friends about the brand;
• family and friends' purchasing behavior;
• in-store experts; and
• existing brand perceptions and purchase intentions.

Data was collected in both the pre- and post-campaign research phases around various brand health metrics for all brands, including awareness (aided and unaided), brand perceptions, future purchase intentions and current device ownership. In the post-phase, the research determined the specific influencers for each brand that consumers had engaged with over the course of the campaign using a proven set of memory triggers (proven 90 percent accurate up to a year after initial exposure).

By comparing pre- and post-data for individual respondents, a clear picture emerged of what brand metrics had changed over time as well as which specific influences or combination of influences each consumer had engaged with. These inputs were used to develop the structural equation models – a model of marketplace influences on brand choice specific to the mobile device industry.

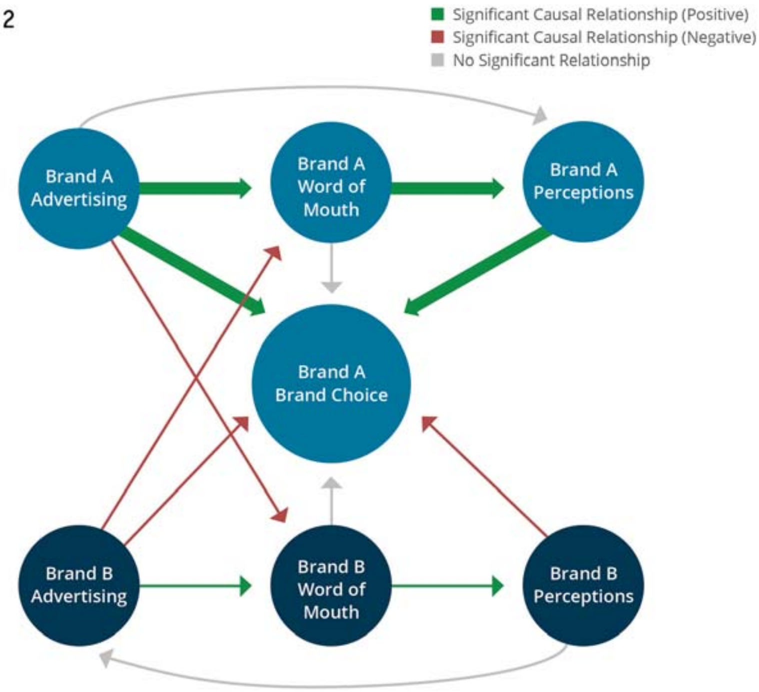
The resulting model clearly highlights how the various influences interact to drive brand choice. For the sake of this article, the model has been simplified to include interactions between the two leading brands: Apple and Samsung. However, these models can be utilized across a more broad set of competitors. During the time frame of the research, Apple was running advertising for its iPhone 5 and iPhone 6 devices, and both AT&T and Verizon were featuring the iPhone in their advertising ("Carrier" spots). Samsung was in-market with Galaxy-focused executions and was also running some Apple-bashing spots around the launch of the iPhone 6.

The first step in this analytic approach is to identify if there are relationships between various influences. In this case, three categories of influence emerged.

1. Advertising. This includes TV, digital and brand-generated social media content for the respective brand, as well as sponsorships and promotions.

2. Word of mouth. This includes word-of-mouth (family or friends saying something about a brand), interaction with in-store experts, recent purchases by friends/family and social media and blog

Figure 2



content generated by friends/family.

3. Brand perceptions. This includes pre- and post-campaign perceptions for each brand across a variety of brand dimensions.

Once these groups of influence are established, the model then highlights the causal relationships between each of the three categories of influence and with demand (brand choice, as reflected by future purchase intentions). This provides a clear picture of how various influences affect one another and, ultimately, generate demand.

Interesting dynamics

Several interesting dynamics emerge in this model to provide insight into what influences drive consumer choice, how competitive dynamics effect choice and the relationship between the various influences.

Word of mouth is critical in maximizing the ultimate impact on brand/device demand. One of the most important findings from this model is that while advertising does generate a positive influence on demand for the featured device, the effect is somewhat stronger when word of mouth is involved in the equation. If we evaluate the following two paths to demand, we find that the path that includes a word of mouth (WoM) component actually has a stronger effect on demand. That is, while advertising does work to directly influence brand choice, it is particularly effective at driving conversations (WoM) among consumers, which improve brand perceptions, which then lead to increased demand.

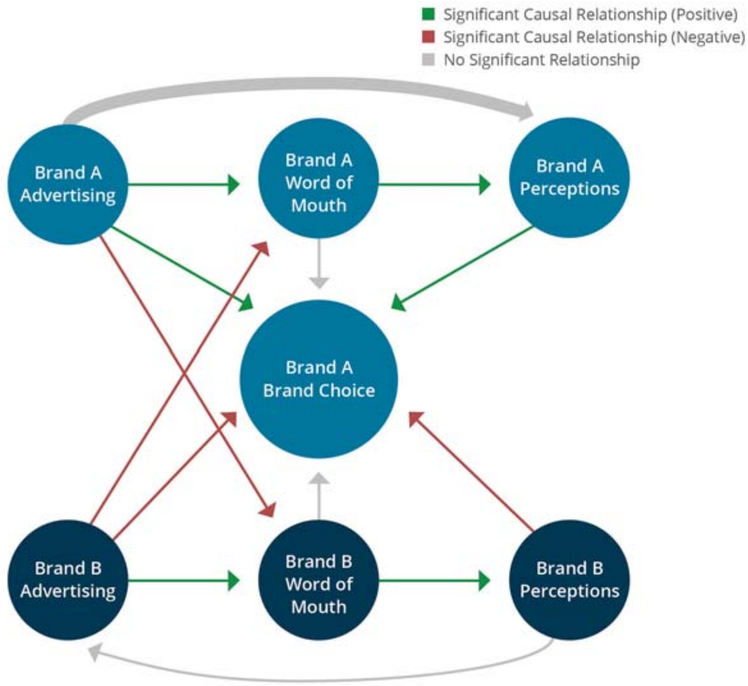
Further exploration into the path from advertising to demand via WoM and perceptions highlights which perceptions are most critical for each brand to build via advertising and WoM in order to increase brand choice. In the case of Apple and Samsung we find that different perceptions drive demand for the respective brand/device.

In the case of Apple, increases in demand are most significant when perceptions that the brand "has the best features and functionality," "is easy to use" and "is worth paying more for" improve. Conversely, Samsung benefits most significantly from improvement in "has great aesthetics" and "is worth paying more for" perceptions. Understanding the key drivers of purchasing for each brand (and key competitors) can help marketers to optimize advertising messages and positioning.

When digging deeper into the direct path between advertising and demand metrics, the study found that television and digital advertising are significant drivers of demand for Apple and Samsung, while brand-generated social media and sponsorships/promotions play more of a supportive role. While these supportive media do have an influence, their power to influence brand choice is strongest when they are seen in conjunction with television or digital advertising. However, the importance of these media should not be underestimated – they often contribute on a very cost-efficient basis and can help to increase campaign intensity (the extent to which the consumer is "surrounded" by brand messages).

Advertising does not have a direct effect on overall brand perceptions. While advertising is certainly able to influence individual brand perceptions, this model tells us that advertising does not have a direct effect on overall brand perceptions. Thus, it is unlikely, in the mobile device space, for advertising to generate a fundamental shift in overall brand perceptions without the benefit of other influences.

Figure 3



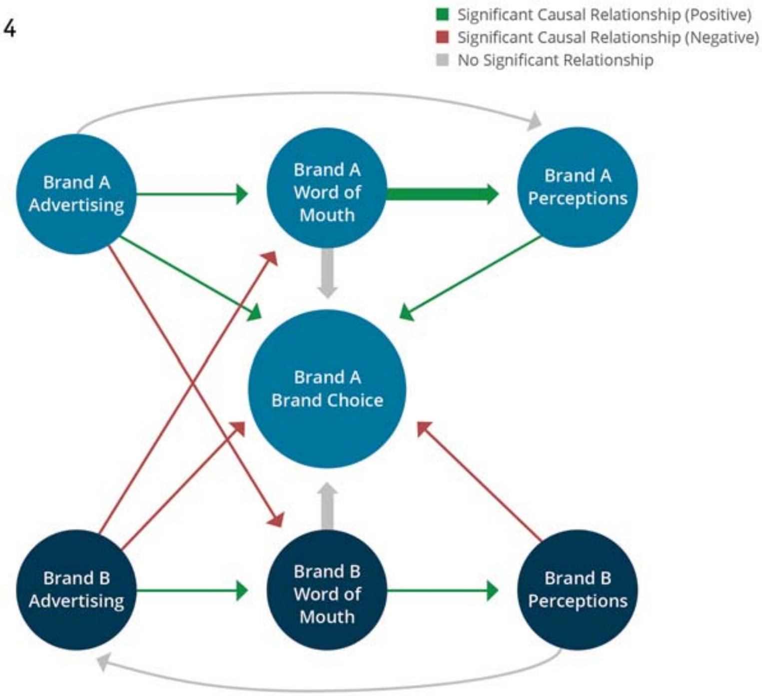
Instead, our research finds that while advertising helps to build select brand perceptions for both Apple and Samsung, the fundamental way that consumers view a brand is not impacted without exposure to some supporting word-of-mouth influences. In other words, consumers are more likely to believe the claims they hear on TV if they are validated via word-of-mouth dynamics – for example, hearing friends and family say something good about a brand or learning about the brand from an in-store expert.

Word of mouth is impactful but it must change the way that consumers perceive the brand. Word-of-mouth dynamics – including hearing good things about a brand from family and friends, hearing that family and friends have purchased a specific device, seeing family- and friend-generated content about a brand on social media and talking with an in-store expert – play an important role in changing the way the consumers perceive a brand, which in turn, drives increases in demand for a brand. However, without this perceptual change, word of mouth is not, in isolation, a significant driver of brand choice.

The good news for marketers is that word-of-mouth dynamics are highly effective in changing brand perceptions, as evidenced by the direct relationship between the two factors. Thus, when marketers can use advertising to fuel conversations about brand benefits and features in the marketplace, the result is often substantial perceptual change and increased demand.

There are strong competitive interac-

Figure 4



tions in the mobile device space (as in most category landscapes). While it is important for researchers to understand the tools and tactics that they can use to drive demand for their brand, it is equally important to understand where the brand is vulnerable to competitive influences.

In the mobile device space, we find that there are plenty of competitive dynamics which will directly affect brand choice.

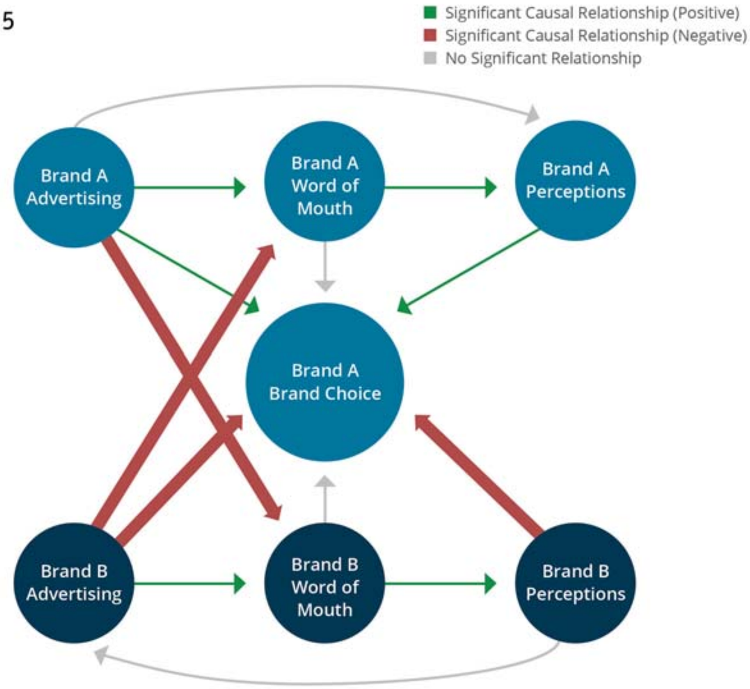
In the case of Apple and Samsung, engagement with a competitive brand's paid media campaign (TV, digital, social, etc.) has the potential to directly affect demand for the opposing brand. Additionally, competitive advertising can temper positive word-of-mouth dynamics for other category brands. The overall effect of these negative influences depends on the strength of the respective advertising campaign; is it engaging, well-branded and highly persuasive? How successful is it at generating conversation and chatter in the marketplace? The stronger the competitive campaign, the stronger the negative implications for other category brands.

In looking specifically at Apple and Samsung dynamics, Apple-generated social media is particularly effective in negatively impacting demand for Samsung. Conversely, Samsung advertising that focuses on Samsung benefits is more successful in decreasing demand for Apple than are their direct Apple-bashing campaign themes.

Provide the most accurate picture

When deciding to develop and leverage structural equation modeling as part of the research toolkit, there are several practices that can ensure that the models provide the most accurate picture of the market and the strongest predictive value.

Figure 5



- When designing research, plan to include a very robust set of potential influences on consumer choice. The model will sort out those that are not impactful or predictive of demand.
- If the goal is to develop a model that can be used across multiple campaigns (as opposed to being designed to evaluate a single point in time among a set of given brands), it is recommended that multiple time periods and campaign evaluations be included in model development to ensure the most robust picture of "typical" marketplace dynamics. Robust sample sizes are also required.
- To determine which specific influences fall into each bucket within the model, an empirical approach can be utilized (exploratory factor analysis), as was in this research, or buckets of influences can be grouped based on theory. It is recommended that researchers use empirical approaches first and then use theory to make the groupings more granular if there is a desire to look at specific influences in isolation or in smaller groups than model generates.
- When developing an SEM model, marketers must work with analysts to develop several hypotheses on how the model might look – how the various buckets of influence might work together to influence demand. (The model will not develop the overall picture of influence without a suggested starting point.) By having several starting hypotheses, data can be run through various hypotheses to determine which models/hypothesis best fit reality.

Optimize future campaign performance

While these models provide valuable insights into current marketplace dynamics that will help to optimize future campaign performance, they can also be used to predict demand and/or future brand health, as the models can be structured to predict any key performance indicator (dimensions other than future brand choice/demand as was used here).

Marketers can use pre-campaign brand perceptions (collected during the first phase of the longitudinal design), coupled with assumptions about future campaign performance gathered from pre-testing results, via early campaign research or based on backward-looking assessment of previous campaigns, to forecast demand using these models. In this way, these models help marketers to design more effective campaigns, make tweaks to new campaigns to optimize ROI early in the media plan and to identify the advertising approach that will produce the strongest outcome (demand) for the brand.

Key findings

The use of SEM models provides valuable learning across the chain of influence that ultimately determines consumer purchase intent and purchasing. In the mobile device space, this approach has helped to highlight several key findings:

- Advertising can be used to directly drive demand but it is particularly impactful in driving positive word-of-mouth in the marketplace, which in turn can change brand perceptions – leading to brand choice.
- Use of this type of model provides valuable insight into which specific brand perceptions are the strongest drivers of increased demand for both the brand of interest and for competitors – important information to drive future campaign messaging and brand positioning.
- Competitive interactions are very strong and brands with strong campaigns and relevant messages have great potential to negatively impact competitive brands. Marketers who do not account for these interactions do so to their peril.
- By understanding and estimating marketplace influences, marketers can generate accurate predictions of future brand health and performance and work to manipulate various influences to achieve future marketing objectives.

The chain of influence

By evaluating various influencers on brand choice in isolation (such as via advertising-only focused retrospective research), marketers are missing out on the big picture. While it is important to understand how all of the individual elements are working for a brand in isolation, understanding the chain of influence across the marketplace provides important insight into how brand can leverage these dynamics to maximize demand. This approach also lets marketers make much more accurate predictions about future brand health and demand, thus enabling brands to be proactive rather than reactive about how to leverage various influences to optimize ROI.

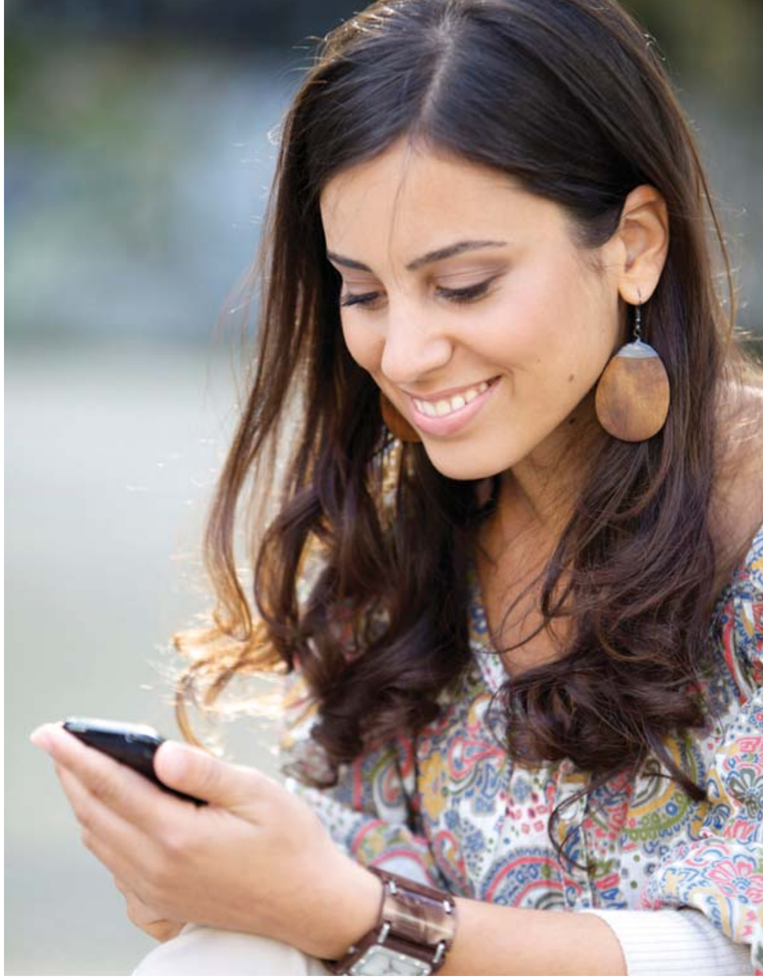
Jennifer Musil is senior account director at Communicus Inc., a Tucson, Ariz., research firm. She can be reached at jen@communicus.com.

advertising research

I see what you mean

Thoughts on the mobile future of Hispanic ad testing

| By Charles Young



snapshot

Charles Young explains how visual-based methods can help mitigate issues related to language and translation when conducting ad research with Hispanic consumers.

Advertising targeted to Hispanic consumers, one of the largest and fastest-growing segments of the U.S. population, will certainly increase steadily over the next few years. But it has been difficult for researchers trying to measure or predict how advertising will perform against this important audience. This is particularly true for the subsegment of the Hispanic audience known as the unacculturated – Spanish-speakers who have not been fully integrated into mainstream U.S. culture.

Three factors are primarily responsible for the difficulties researchers have in testing Hispanic-targeted ads. The first is the problem of obtaining a reliable sample for quantitative research among this hard-to-reach group. The second problem is that of measurement – or, more specifically for pre-testing advertising, how to properly calibrate the Hispanic audience's different use of rating scales so that they can be properly interpreted in comparison with performance metrics for the general market. The third problem is that of translation or how to capture the emotional nuances of Hispanic-targeted ads.

The large panel companies that are hard at work gradually building panels of Hispanic consumers to interview are solving the first problem. The breakthrough in this area is likely to come from the emergence of mobile research, i.e., data collection on mobile devices such as smartphones and tablets. In trying to design a representative sample for a survey it is much easier to reach a typical unacculturated Spanish-speaking consumer on an Android phone than on a desktop computer. The challenge, of course, is creating an ad test interview that works well on a mobile device.

The second problem of calibrating measurements arises from the well-known Hispanic tendency to use the more positive end of rating scales in expressing their opinions. For report-card measures such as attention and motivation, Hispanic aver-

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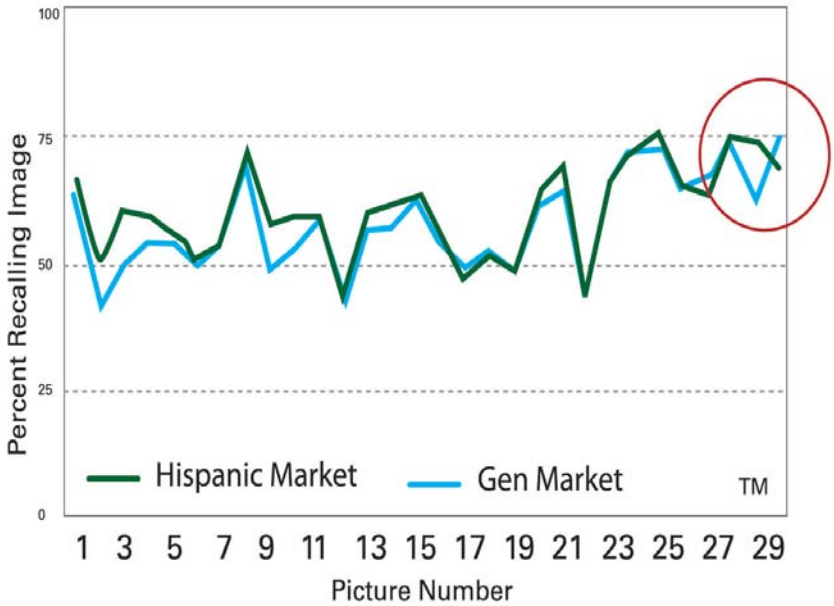
ages are 20-80 percent higher than the averages for the general market. And for diagnostic ratings some gaps are even larger but vary depending on the item being rated.

A solution for this is to test a large enough number of ads against a Hispanic audience to have a stable database of norms. But this really only solves part of the problem. Given that the average ad tested among Hispanics is found “likeable” by 83 percent of respondents or that the average ad is found “entertaining” by 78 percent of respondents, that does not leave a lot of headroom for discriminating between strong ads and only average ads.

Using rating statements alone to diagnose the performance of an ad, nine out of 10 Hispanic respondents would have to say they like an ad or find the ad to be entertaining for that ad to score “significantly” above average on a copy test. To creatives working in Hispanic ad agencies, this must seem to be a pretty high bar of commercial performance.

Figure 1

Picture Sorts® Flow of Attention (memory)



The third problem, translation, reminds me of the urban legend about the marketing blunder of Chevrolet introducing a new car into Mexico where it did not realize that "nova" translates as "doesn't go" in Spanish.

Not the only way to communicate

In the visual age of YouTube, Pinterest, Instagram and Snapchat, we are reminded that verbal language is not the only way to communicate with consumers about their thoughts and feelings about advertising. Rating statements, whether in English or Spanish, while not exactly a thing of the past, are finally revealed for what they really are – only a limited and partial window into the mind of the consumer.

The high-resolution touchscreens on smartphones and tablets open new windows of non-verbal measurement for researchers – measurements that cross traditional language barriers. Sorting pictures with the flick of a finger on a mobile device can be a fun, game-like activity. And if those pictures happen to have been taken from a TV commercial or Web video that the player was just shown a minute or so earlier, it can produce powerful data – data about memory and emotion and meaning, all critical components of effective advertising.

As a mainstream ad testing service, Ameritest combines standard measures of ad performance – attention, branding, communication and motivation – with our proprietary Picture Sort diagnostics to provide non-verbal insights into the reasons why ads perform the way they do. A couple of years ago we first began to develop mobile-friendly versions of our standard interview and quickly validated the data generated on mobile devices to be comparable to historical norms generated by PC-based interviews. The next step of our ongoing R&D effort was to prove that the test data collected on a mobile device is valid for research among a Hispanic audience.

The idea that photographs can be used to retrieve images deposited in human memory by advertising is intuitive – the reason we all keep family albums or these days build Shutterfly photobooks is to preserve memories of the experiences of our lives.

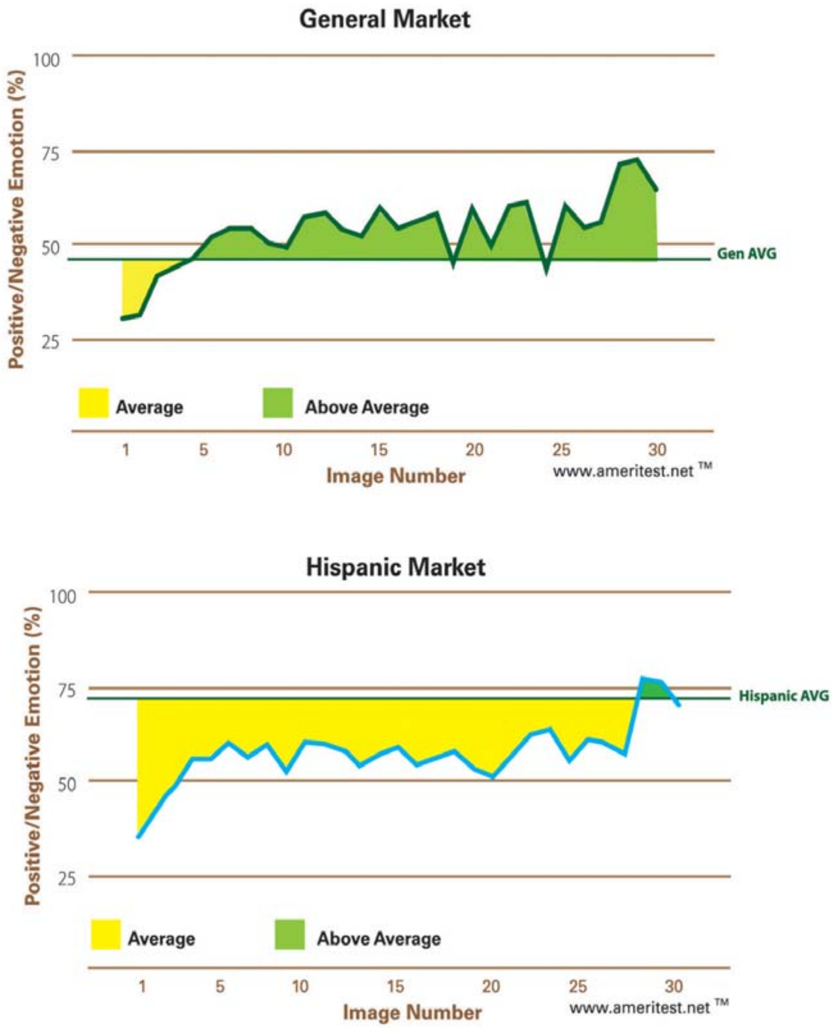
Similarly, the idea that a photograph can be a "container" for sharing a human emotion is also obvious – it's the reason photographs play such an important role in social media, as we share our emotions visually with our friends on Facebook or Pinterest, etc.

The pictures that we post are the ones that mean something special to us. The important thing to understand about meaningful pictures is that the surface meaning or semantic meaning of a picture is not usually what we care about. The old adage that a "picture is worth a thousand words" is not, in fact, true. A picture conveys meanings that cannot be put into words, just as a piece of music or song that we love cannot be expressed in language – it's the aesthetic content of the music or the image that moves us.

Finally, for the purpose of doing research among Hispanic audiences, pictures give us a universal vocabu-

Figure 2

Emotional Response: Hispanic vs. General Market



lary for probing for insights into how advertising is working that is not constrained by the boundaries between English and Spanish. And, as we will see, picture-based measurement may not be as culturally-biased as the traditional research tool, the rating statement.

Of course, advertisers develop creative executions specifically targeted to Hispanic audiences with the idea that the stories or images that Hispanics respond to in an ad will sometimes be different due to differences in cultural reference points. Otherwise, marketing to Hispanic audiences would consist of nothing more than translating English copy into Spanish.

Be able to distinguish

To tease out the nuances of Hispanic marketing, therefore, it is important for researchers to be able to distinguish between a) the differences in how Hispanic and gen-pop audiences respond to an ad and b) the differences in how the two groups might perform research tasks.

In order to not get sidetracked into the complex story of why these two audiences might respond differently to advertising of one kind or another, let's instead look at the simpler problem of similarities and differences in how they perform research tasks.

As an example, consider an ad for Target stores that tested strongly on

Figure 3

Flow of Meaning

	Brand Selection		Fun		Value	
	Gen.	Hispanic	Gen.	Hispanic	Gen.	Hispanic
	31	30	14	20	17	26
	20	23	38	35	10	15
	9	11	6	8	59	51

The meanings the Hispanic audience takes away from these frames in the Target ad are smiliar to the Gen Market takeaways.

key performance metrics among the general population but only average among the Hispanic audience.

First, in a visual test of memory, using the first of our three picture-sort diagnostics, the Flow of Attention (Figure 1), we see that both audiences processed the visual information into short-term memory in identical ways. In our experience, this is not too surprising, given that the memory test is really a test of visual syntax or visual grammar, which says for both audiences the visual storytelling of the ad was clear. (A weakness on this measure could have led us to diagnose a problem with the breakthrough attention score – but that was not an issue with either audience.)

But on the second diagnostic, using pictures to retrieve the audience's emotional experience of the ad, we saw a strong difference relative to the average. In other words, the general audience experienced much more positive emotions than the Hispanic audience (Figure 2) – which is why this ad was significantly more motivating to the general population.

Finally, on the third diagnostic, where we measure the meaning of each image frame-by-frame relative to the communication objectives of the brand strategy, we see that both audiences take away the same ideas from the visual imagery in the ad (Figure 3).

In short, using the picture sort diagnostics, we arrive at an insight into the reasons for the difference in performance between the two audiences (that we did not find in the rating statements): the difference is due to different levels of emotional response to the ad, not the clarity or memorability of the communications.

Measure and optimize

What this brief case study demonstrates is that with the power of new research tools that are now at hand – the combination of mobile plus picture sorts, for example – the ability of advertisers to not only measure but to optimize the performance of Hispanic targeted advertising will be greatly enhanced in the near future.

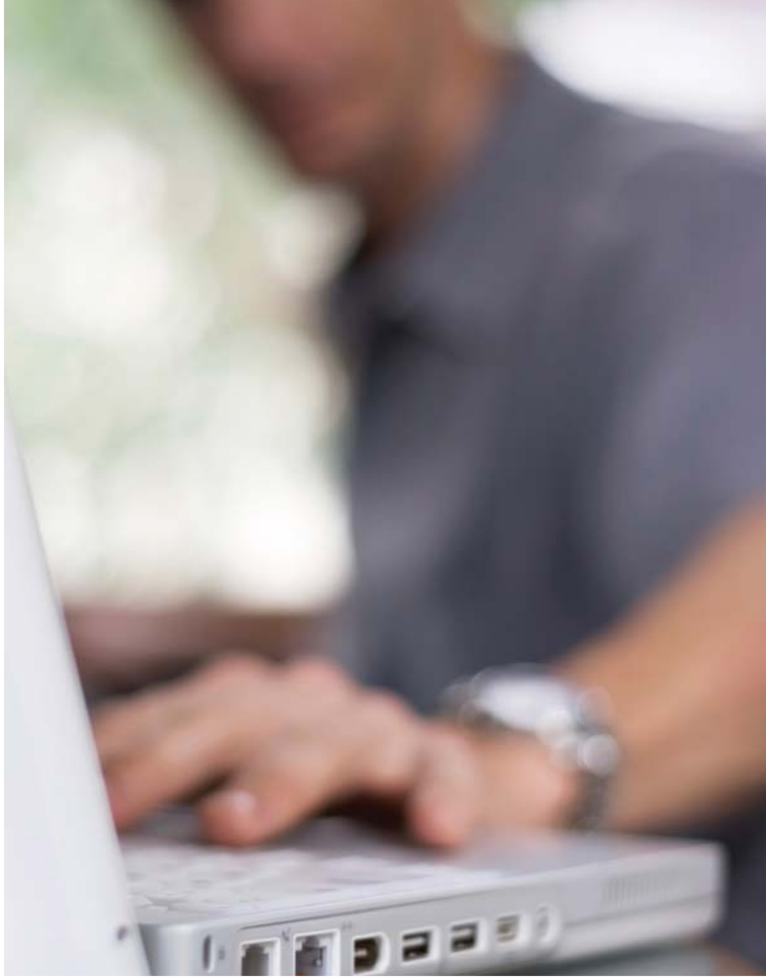
Charles Young is founder and CEO of Ameritest, an Albuquerque, N.M., research firm. He can be reached at chuck@ameritest.net.

●●● advertising research

Making the most of it

The benefits of using online qualitative to test ads

| By Paul Rubenstein



snapshot

The author outlines how the Web has expanded the reach of qualitative ad-testing methods and offers some thoughts on how to apply them.

For decades, qualitative research has been used to inform advertising and communication strategies and to test ads before they are made public. Steps in the development process usually have organizations (and their agencies) moving from creating advertising concepts to designing storyboards and animatics to assembling final executions. All of this is often fueled by the insights gathered at each point using traditional focus groups.

And it is the focus group that has been the predominant method used to achieve ad testing related study objectives. Data collected in these studies are used to inform strategies and tactics in terms of what to say and how to say it. That is because consumers' opinions about the subject matter and specific stimuli to which they are asked to react is used as the foundation of advertising and communications.

Particularly when brainstorming is needed among consumers, conditions that foster creativity can be facilitated by a group setting. Hearing others' ideas helps individuals come up with their own. Furthermore, role-playing and other projective techniques are tried-and-true exercises that have been used successfully in focus groups conducted for ad testing purposes for many years. Simply, a moderator is not worth his salt if he has never used some of these techniques, at least sometimes, and certainly for ad development purposes.

However, there are several highly effective projective techniques and other kinds of exercises that can be problematic to execute in an in-person setting like a focus group facility. Whether it is perception-mapping or sorting, storytelling projectives, image-tracking, text-tracking or dial-testing exercises that need to be deployed, using printed materials, markers, scrap paper, glues, pins, dials or spit and tissue paper, successfully managing these kinds of research techniques is among the greatest challenges for a moderator.

In contrast, shifting data collection methods from face-to-face (F2F) to an (asynchronous) online qualitative research platform that has these functions can not only produce more data and cost less than focus groups but will enable these sorts of advanced research techniques to be utilized more easily and the data gathered will be analyzed with greater

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precision.

To begin, let's understand the entire research agenda involved at various steps in the development and execution of advertising campaigns. As stated earlier, the entire end-to-end process involved in advertising development can be boiled down to three simple questions:

1. What should the ad say?
2. How should it be said?
3. How well did the ad work?

These fundamental questions can be mapped to specific types of research studies, namely: consideration (What should the ad say?), articulation and execution (How should it be said?) and evaluation studies (How well did the ad work?), respectively. Beginning with consideration research, the main objective is to understand the equity of a given brand within the context of its competitive landscape. As such, the researcher must uncover and reveal how consumers conceptualize the industry in question and which key characteristics drive their consideration of one brand over others.

Consideration research

A useful technique for consideration research is perception mapping, which can be executed in both quantitative as well as qualitative research. In quantitative research, a set of multivariate techniques are brought to bear, including discriminant function analysis, correspondence analysis or multidimensional scaling. The resulting perception map formed from the pattern in the quantitative data shows how target consumers view the similarities and differences between brands and which brand characteristics define each best.

But a highly useful, first phase of consideration research may warrant a qualitative study that is used to inform the subsequent quantitative phase. In this case, a perception-mapping exercise, similar to what has been used in focus groups for so many years, may be improved in its execution if done online. Through simple and fun drag-and-drop motions that participants are instructed to perform, a resulting perception map may be determined accurately and easily, as shown in Figure 1's mock example.

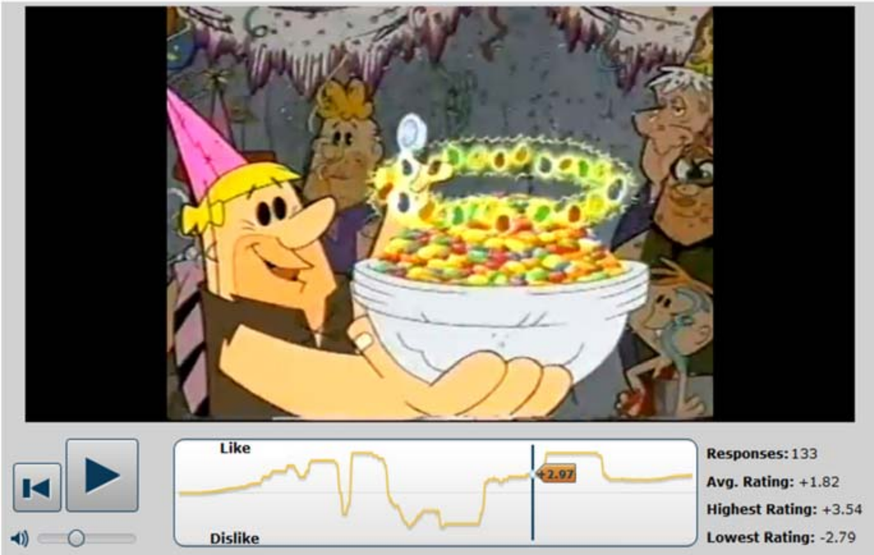
As the map shows, the position of each logo is automatically determined by the programming of the platform, which is set to place each one at the average X and Y bivariate coordinates calculated from the pool of participants

Figure 1

Figure 2

Figure 3

Figure 4



in the study. To do so accurately using F2F methods is almost impossible. Furthermore, using an online qualitative research platform for this purpose enables the moderator to filter the data with a button push or two in order to test any study objectives that warrant subgroup analyses.

For that matter, other projectives that require drag-and-drop may also be used. These include various sorting exercises in which the number of or labels for the categories may or may not be provided in advance.

Another projective technique that has been utilized for decades in focus groups is storytelling, which uses a set of images that evoke various positive and negative emotions in people. These images are shown to participants who are asked to choose, from the set, ones that they then put in some order and use to tell a story about the subject matter. This exercise is most easily facilitated online through drag-and-drop functions built into the platform and yield individual responses that are captured along with (text-based) stories. Moreover, these stories integrating images and text can be readily copied and pasted into the moderator's report with a few button pushes, as opposed to the tallying (by hand) of each story, each image and each participant's ID number, as would be the case in a traditional focus group setting.

Articulation research

In articulation research, the main objective is to inform "how to say it." This, too, can entail integrated phases of both qualitative and quantitative studies, one informing the other and each designed to do just that. Regardless of the type of study, it will include gathering the reactions from target consumers to a distinct advertising/communication stimulus, e.g., print ad, advertising concept description.

For these types of qualitative studies, moderating discussion among participants to generate their ideas for ads is usually a part. In addition, participants also are shown various articulations that have been developed by the organization and/or its ad agency. These stimuli then become the grist for the mill to sharpen, clarify, improve or even eliminate by using functions such as image tracking or text tracking. As can be seen in Figure 2, participants can isolate portions of the stimuli according to the moderator's needs, such as "draw a red circle around the portions you like."

Likewise, in the case of text tracking shown in Figure 3, the instructions to the participant may be to "highlight the specific words you find confusing."

And if the stimulus is a video as opposed to a static image, such as a TV commercial, dial-testing is arguably the best technique to evaluate this kind of stimulus. It directly shows at what point during the span of time of the commercial (e.g., 30 seconds, 60 seconds) participants liked or disliked the ad and is usually utilized after a finished commercial has been developed and about to air (Figure 4).

All of these articulation-testing exercises have been used in focus groups for a long time, for at least the past 20 years. I remember many years ago having to carry the heavy, sometimes-reliable dial-testing equipment to the special facility with auditorium seating to run dial-testing focus groups. These groups were very expensive for the client and nerve-wracking to the moderator as dials, wires and their connections would sometimes be faulty.

But nowadays, thanks to online qualitative research platforms, all these functions are facilitated very easily and far less expensively. Aggregating the data, creating output and including it in final report deliverables is handled by some clicks on the screen.

Whole new world

This is a great time to be in the market research industry. The confluence of broadband connectivity, digital technology and the comfort level and skill of consumers in communicating so easily and so well within computer-mediated environments has opened up a whole new world of possibilities in social research in general and market research in particular. Considering that focus groups have been done the same way for over four decades, qualitative research was very much in need of some fresh approaches.

Over the same time period, quantitative research has undergone radical shifts and improvements as a function of advances in technology that have improved data quality and reduced cost and time requirements. Indeed, it is a rare occasion when quantitative surveys need to be administered F2F, e.g., mall intercepts.

Moderators will be ever more hard-pressed to rationalize to clients their choice of F2F and why they are not shifting to an online method for studies like these. Indeed, the potential for "better, cheaper and faster" is a compelling argument that forces client-side research managers to embrace online methods as they, too, will need to rationalize their choices to the clients they serve within their organizations.

Paul Rubenstein is president and CEO of Accelerant Research, Charlotte, N.C. He can be reached at paulr@accelerantresearch.com.

Names of Note

■ *Newsworks*, a London-based newspaper marketing body, has appointed **Denise Turner** as director of insight.

■ *MarketVision Research*, Cincinnati, has promoted **Prasad Samala** to research director and **Allison Breitenbach** to senior research associate.

■ Automaker *Ford* has hired **Paul Ballew** for the newly created role of chief data and analytics officer. His responsibilities will focus on understanding consumer behavior and leading the company's data and analytic efforts globally.

■ *LEWIS PR*, a San Francisco communications agency, has hired **Matt Robbins** as director of market insight and research. He will be based in the LEWIS Washington, D.C., office.

■ *Alcon Entertainment*, a Los Angeles film and television production company, has hired sisters **Catherine** and **Angela Paura** as co-presidents of Worldwide Marketing, a division of Alcon.

■ Minneapolis-based *Target Corporation* has appointed **Paritosh Desai** as senior vice president, enterprise data, analytics and business intelligence. He will be leading the company's new "center of excellence" which combines its data, analytics and business intelligence efforts. Also, **Casey Carl** was promoted to chief strategy and innovation officer; **Laysha Ward** to executive vice president, chief corporate social responsibility officer; **Jason Goldberger** to president, Target.com and mobile, and **John Hulbert** to vice president, investor relations. Finally, **Jeff Jones**, currently chief marketing officer, has also assumed the responsibility of guest experience across all channels.

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2015/20150312

■ *Consumer Opinion Services* has promoted **Melissa Bledsoe** to general manager of Portland (Ore.) operations.


Bledsoe

■ **Reedi Hawkins** has joined the *Albany-Dougherty Economic Development Commission*, Albany, Ga., as director of marketing and research.

■ *Applied Marketing Science Inc.*, a Waltham, Mass., research and consulting firm, has promoted **Brian Sowers** to principal and **Jason Och** to associate principal in the firm's litigation support practice.


Sowers

■ Stockholm software company *Cint* has appointed **Morten Strand** as CEO. He replaces **Bo Mattsson** who will remain on the board.

■ **Laura J. Ashworth** has joined the *Danville Office of Economic Development* in Danville, Va., as marketing and research manager.

■ London research firm *TNS UK* has hired **Jamie Burnett** as director of survey methods and sampling.

■ **Patricia Moy** has assumed the office of president at the *World Association for Public Opinion Research* (WAPOR). **Mike Traugott** will serve as WAPOR secretary treasurer, replacing **Claire Durand**, who becomes vice president and president-elect.

■ *W5 Inc.*, a Durham, N.C., research firm, has named **Tristan Shook** to partner to lead its research strategy practice.


Shook

■ U.K. researcher *BrainJuicer Group* announced several internal promotions in the Americas and Europe. In the U.S., **Alex Hunt**, formerly executive vice president U.S., will assume the role of president, the Americas, based out of BrainJuicer's New York office, and also become a part of BrainJuicer's executive management team. In his new role, he will oversee the company's North and Latin American businesses and manage the U.S. qualitative Juice Generation team, led by **Ellen Kolsto**. The new Latin American Miami office will be led by **Gabriel Aleixo**, formerly managing director - Brazil, who will oversee LATAM operations. **Brent Snider**, formerly executive vice president - Eastern Region, U.S., will assume the role of president, North America, with responsibility for all U.S. teams. In Europe, **Mark Johnson**, formerly managing director, Continental Europe, will assume leadership of all European teams including the U.K. and become a member of BrainJuicer's executive management team. In the U.K., **David Whitelam**, formerly senior client director, will be promoted to managing director - U.K.

■ *Sunshine Bancorp Inc.*, Plant City, Fla., has named **Michelle Kounlavong** AVP, marketing director. She will direct bank marketing and advertising functions including brand identity, strategic planning, market research and communications.

■ Pittsburgh researcher *CivicScience* has added **Jake Sedlock** as vice president of client development.

■ Singapore-based research firm *Asia Insight* has tapped **Adrian Tan** as its managing director to head its Singapore and China offices.


Treat

■ *Dialsmith*, a Portland, Ore., technology company, has hired **Greg Treat** as a project consultant on its Perception Analyzer research consulting team.

■ Bethesda, Md., research firm *Abt Associates* has named **Jack Downey** as senior vice president, business development and new market initiatives, providing strategic direction to Abt's Global Business Development Unit.

■ London-based *TNS UK* has promoted **Desiree Lopez** to CEO of TNS BMRB. She will also join the TNS UK board.

■ U.K.-based *eDigitalResearch* has expanded its technical team, promoting **Lee Boynton** and **Andy Cook** to the strategic technical team as analyst software engineers, with a core responsibility of developing the eDigitalResearch SaaS platform.

■ *Full Circle Research Co.*, Potomac, Md., has added **Jennifer Philips** as Northeast regional sales director.

■ **Lana M. Shaw** has been named marketing director at *Adams Bank & Trust*, Ogallala, Neb.

■ *Nielsen* has tapped **Glenn Enoch** as senior vice president-audience insights, succeeding **Pat McDonough**, who retired in December.

■ *TNS*, London, has named **Andrew Lancefield** as chief operating officer of the Africa, Mediterranean and Middle East region and **Stephen Hillebrand** as CEO for the Middle East.

■ In Wixom, Mich., *ProMotion Technology Group* named **Spencer Knisely** chief marketing officer.

■ **Wayne R. McCullough**, the *University of Michigan Health System*, has been elected as president of the board of the **Marketing Research Institute International** (MRII). The board also elected **Lisa Courtade**, *Merck*, as president-elect and **Bart Weiner**, *BW Consulting*, as treasurer.

■ *Thoroughbred Research Group*, Louisville, has hired **Robert Ceurvorst** as a senior methodologist, working primarily with the health care group and analytics team.

■ *M3 Global Research*, Washington, D.C., has hired **Julien Munsch** and **Lorena Montero** to its London office. Also, **Christine Lazauskas**, **Jeff Gaglio**, **Stephanie Welles** and **Jackie Prinder** have joined the New York office of M3, along with **Amber Esco** as vice president of sales.


Esco

■ *DunnhumbyUSA*, Cincinnati, has appointed **Michael Whynott** as senior associate custom insights and promoted **Ben Voorhorst** to analyst, manufacturer practice; **Holly Laiveling** to senior associate, custom insights; **Julian Farbstein** to vice president, client leadership; and **John Rudisill** to director, analysis.

■ *Marketing Sciences Unlimited*, a Southampton, U.K., marketing firm, has promoted **Deborah Hall** and **Gerry Curtis** to research director, **Sadie Buckingham** to associate director and **Becky Hutchins** to senior research executive.

■ *Social@Ogilvy*, the social media commerce division of New York marketing firm Ogilvy & Mather, appointed **Samson Choi** as general manager in Hong Kong. He will be responsible for expanding Social@Ogilvy's services and overseeing social media marketing activities for clients.

■ New York loyalty and analytics firm *CrowdTwist* has appointed **Scott Matthews** as CEO.


Stracey

■ *Dub*, a London software firm, has hired **Dan Stracey** as chief inspiration officer.

■ *Behavioural Architects*, a London research company, has expanded its staff in several offices. **Nikki Dahlgren** joined the Sydney team as senior behavioral consultant; **Natasha Xue** and **Lynette Xu** have joined the China team as consultant and **Andreea Balica** and **George Deane** have joined the London team as strategic consultant.

■ *Bacardi Limited*, the Bermuda-based liquor company, has promoted **Dmitry "Dima" Ivanov** to chief marketing officer.

■ *Clear Channel UK*, the outdoor media company based in London, has hired **Sarah Speake** as chief marketing officer.

■ In its New York office, *GfK* has promoted **Kevin Taylor** to executive vice president of technology and **Gary Schanzer** to manager of the digital market intelligence team as well as managing director of the shopper and retail strategy team.

■ **Bruce Cook** has joined London researcher *SMG Insight* as a company director.

■ New York research firm *Millward Brown* has hired **Karen Rivoire** as chief human resources officer.

■ *MediaMath*, a New York digital marketing technology company, has appointed **Rahul Vasudev** as managing director for the Asia-Pacific region.

■ **Laura Chaibi** has been named head of digital research for the *Middle East Broadcasting Center*, Dubai.

■ **Joan Lewis** has joined the Reston, Va., research company *comScore* board of directors, filling the vacancy left with the resignation of Jeffrey Ganek.

■ London research firm *Trinity McQueen* has named **Jo Zukunft** as research manager in London. In the firm's Leeds office, **Andrew Magee** has joined as research manager, **Sarah Broadbent** as senior research executive and **Michael Holmes** as project executive.

■ In Burlington, Mass., health care analyst *Decision Resources Group* has appointed **Mark Luck Olson** as president, global consulting services.

■ Research software provider *Dapresy*, Norrkoping, Sweden, has hired **Alexander Skorka** to lead its office in Germany.

■ **Prashant Fuloria** was named senior vice president of advertising products at *Yahoo!* in San Francisco.

■ London research firm *Ugam* has added three members to its business development and services team, **Robert Clark** as business strategy consultant, **Angela Park** as sales director and **Sau Lam** as client director.

■ **Joanna Fanuele** has been hired as the new global innovation lead at *Hall & Partners*, a London research company.

■ **Alwin Thompson** has assumed the role of non-executive director at *Join the Dots*, the Manchester, U.K., consumer insight agency.

Thompson

■ In London, *ETOA*, the European tourism association, has appointed **Paul Rickard** as a research consultant.

■ Sports marketing researcher *Repucom*, London, has hired **Simon Long** as head of sales for the U.K. and Ireland. He will be responsible for the development and implementation of the firm's commercial strategy.

■ *The NPD Group*, a Port Washington, N.Y., research group, announced that **Michel Maury**, now European group president, will also assume responsibilities for the firm's operations in Asia Pacific. A European executive committee has been created to manage NPD's European operations, consisting of **David Pritchard**, European deputy managing director, **Philippe Court**, CFO for Europe, **Catherine Rozanski**, HR head for Europe and Asia and **Philippe Cabin Saint Marcel**, general manager of commercial activities for Europe. **Tim Bush**, the previous Asia Pacific group president, is returning to the U.S. to become group president of NA commercial sectors for the U.S., Canada and Mexico.

■ London researcher *Incite* has hired **Jason Spencer** to head its new Shangai office.

■ **Margo Swadley** has joined *Kantar Media*, London, as managing director for U.K. TV and video measurement.

■ **Tim Britton** has left his position as U.K. CEO of *YouGov*, a London-based research firm. **Alex McIntosh**, chief strategy officer, will replace him on an interim basis. **Rosemary Leith** has joined YouGov as a non-executive director.

■ At the London office of researcher *TNS*, **Anjali Puri** was promoted to global head of TNS qualitative, replacing **Rebecca Wynberg**, who will move to a non-executive position as chair of TNS qualitative.

■ *Information Resources Inc.*, a Chicago research firm, has hired **Michael Rosenthal** as executive vice president of global operations.

■ **Maritza Matheus** has joined **EurekaFacts**, a Rockville, Md., research firm, as director of marketing research. **Alec Ulasevich** has also joined as director of social science research.

■ London technology firm *Data Liberation* has appointed **Pat Molloy** as CEO, replacing founder **Chris Morgan**, who assumes the role of chairman and COO.

■ *EDigitalResearch* has announced several hirings and promotions. **Liz Boffey** has joined as research director, along with **Sian O'Neill** as marketing executive, **Steve Loton** as marketing designer and **Radoslaw Kuroski** to the technical operations team. **Sarah Leaners** was promoted to associate director, **Kat Watters** and **Lisa Williams** to senior research manager and **Jenny Hilton** to research manager.

■ **Moniola Olusanjo** has joined the London office of *Research Partnership* as compliance manager.

■ **Suzanne Sell** was recently promoted to senior vice president for research and **Neal Massey** to vice president, business and consumer insights for research, at *Starz Network*, the Denver-based entertainment company.

■ *British Airways*, Middlesex, U.K., has established a standalone customer experience unit and appointed head of customer to **Abigail Comber**, formerly head of marketing. Her new role will encompass research and insight, innovation and brand proposition.

Research Industry News

News notes

■ ***The Wall Street Journal*** has reported that **CNBC** will no longer use **Nielsen** to measure its daytime audience. Instead, it will use the services of **Cogent**, a unit of Market Strategies International, which will survey over 1,000 investors and financial advisers on their media habits during the day and use that data to provide ratings for CNBC. CNBC has long claimed that Nielsen's in-home-viewing-based system underestimates the network's total viewership by excluding viewers in places like offices and airports. "Nielsen has never measured us accurately," CNBC President Mark Hoffman told the *Journal*. "If we can't count the people the right way we can't get paid the right way." Cogent ratings will be used starting in the fourth quarter of 2015.

■ Los Angeles software firm **MarketShare** has formed a technology advisory board comprised of five experts from the fields of ad technology and big data software to guide the firm's product development. Former executives from major Internet firms are included on the board, including Greg Badros, currently at Prepared Mind Innovations and formerly at Facebook and Google, Gokul Rajaram, currently at Square and formerly at Facebook and Google AdSense, and John Slade, formerly at Yahoo!

quirks.com/articles/
2015/20150313

Acquisitions/transactions

■ **Teradata**, a Dayton, Ohio, data analytics company, has purchased **Appoxee**, a Tel Aviv, Israel, marketing firm. The acquisition will allow Teradata to enhance its mobile marketing capabilities with Appoxee's marketing automation platforms.

■ **Datawise Management Services**, a Hyderabad, India, management consulting firm, has acquired **ComSim Inc.**, a Fairfield, Conn., research company, through a stock purchase.

■ Stamford, Conn., researcher **FocusVision** has acquired Fresno, Calif.-based **Decipher** for an undisclosed amount. FocusVision clients will now have access to Decipher's survey and reporting software platforms and survey tools, while Decipher clients will maintain access to all research portals, tools and reports. Jamin Brazil will remain CEO of Decipher while Jayme Plunkett will become chief product officer for the combined company.

■ San Mateo, Calif.-based **Fractal Analytics** has acquired **Mobius Innovations**, a mobile context awareness platform founded by Fractal's co-founder Nirmal Palaparthi, to enhance the company's flagship Customer Genomics personalized marketing solution.

■ **Facebook**, Menlo Park, Calif., has acquired **Wit.ai**, a speech recognition start-up located in San Francisco, for an undisclosed sum.

■ **Safe Foods International Holdings** (SFIH), Washington, D.C., has acquired the **International Food Network** (IFN), a product development consultant in Ithaca, N.Y. IFN will be partnering with The National Food Laboratory, another division of SFIH, to provide product and process development services. It will have four test facilities with culinary kitchens, sensory booths and analytical labs in San Francisco, Ithaca, N.Y., Naples, Fla., and Reading, U.K.

■ New York researcher **Nielsen** has acquired **Brandbank**, a Norwich, U.K., firm that creates, manages and distributes content for multichannel retailing. Nielsen will acquire all Brandbank data, working processes and current client work. Terms were not disclosed.

■ In London, user design specialist **Foolproof** has acquired technology firm **Knit** for an undisclosed sum. Knit produces personalization and targeting software. Under the agreement, Knit will retain its name and founder Nick Thompson will continue to run the company.

■ In San Francisco, software giant **Oracle** will acquire New York firm **Datalogix**, which operates an audience tracking tool for over $2 trillion in consumer spending. Terms were not disclosed.

■ **Dun & Bradstreet**, Short Hills, N.J., has acquired **NetProspex**, a Waltham, Mass., B2B data firm for $125 million. NetProspex and its employees are now a part of Dun & Bradstreet and will continue to operate out of the Waltham offices. NetProspex CEO Michael Bird will transition to general manager of the newly-named Dun & Bradstreet NetProspex.

■ British ad management company **Admedo** has acquired New York-based online advertising and targeting specialist **Dispop**. Terms were not disclosed.

■ New York researcher **Millward Brown** has acquired **Habitus Investigación**, a research firm in Quito, Ecuador. Habitus has its own national demographic panel and has developed proprietary software for questionnaire design. It also provides a range of qual and quant market research services.

■ Portland, Ore., software firm **Janrain** has acquired **Arktan**, a Redwood City, Calif., firm specializing in social media engagement and trends. The merger will allow Janrain to integrate its customer identity information with engagement and activity data, allowing marketers to better understand their customers. Arktan co-founder Rahul Aggarwai has joined Janrain as general manager of its customer engagement business unit.

■ Cincinnati researcher **Burke, Inc.**, has acquired **Seed Strategy**, a Cincinnati marketing and advertising firm.

■ **AppNexus**, a New York technology firm specializing in online advertising, has acquired **MediaGlu**, a Baltimore marketing company.

■ **IS Solutions**, a Middlesex, U.K., software firm, plans to purchase **Speed-Trap Holdings**, parent company of Celebrus Technologies, London. The cost of the acquisition is estimated at £7.5 million.

■ **Microsoft** has acquired **Equivio**, an Israeli-based data analytics software firm, for a sum reported as between $150 and $200 million. The Equivio software allows governments, corporations or other large organizations to sift through large amounts of data to locate references to legal or compliance issues.

Alliances/strategic partnerships

■ **PlaceIQ** is partnering with **Starcom MediaVest Group** (SMG) to develop a software platform, SMG MAPS, which uses consumer behavioral, demographic and consumption data across geographies and devices to provide insights for media planning and measurement.

■ **Literated**, a Bangalore, India, research firm, and **iData Insights**, a New Delhi research firm, have partnered to allow the distribution of iData Insights' proprietary market analysis through the Literated.com Web site.

■ Portland, Ore., researcher **Rentrak** is partnering with Wilton, Conn.-based **Kantar Shopcom**, the analytics and insights division of Kantar, to integrate the Kantar retail purchase data and information for over 300 million U.S. consumers into Rentrak's software for measuring television viewing. In turn, Shopcom will add the Rentrak TV viewing information from millions of U.S. households into its targeting and measurement software.

■ **Nebu**, the Netherlands-based software firm, is branching into the U.S. by partnering with **thinqonline**, New York, to be its sole U.S.-based reseller.

■ **Actus Sales Intelligence**, Fort Worth, Texas, has announced a strategic partnership with **Sales Training and Results** (STAR), with offices in Myrtle Beach, S.C., and Kingston, Mass. STAR provides training for sales and management staff. Actus will now offer the training workshops to the marketing research industry.

Awards/rankings

■ In London, technology firm **Intellection** received the **Market Research Society/ Association for Survey Computing (MRS/ ACS) Award for Technology Effectiveness** for its entry Insight Out. This annual award is for innovative applications of software or technology which contributed to an improvement in the effectiveness of market research.

■ **Blueocean Market Intelligence**, Seattle, has been honored in two national public relations awards programs. **PR Daily's Digital Awards 2014** and **PR News' Digital PR Awards** both awarded honorable mentions to the firm for enterprise-level social intelligence campaigns.

■ Pizza chain **Papa Murphy's** has been named a Chain Restaurant Consumers' Choice Award winner for 2015 by Chicago research firm **Technomic** and awarded the quick-serve concept most likely to be recommended by consumers.

New accounts/projects

■ Portland, Ore., researcher **Rentrak** has signed a multiyear agreement with **Citadel Communications** for its ABC affiliate in Providence, R.I. (WLNE).

■ **Sorenson Media**, a Salt Lake City technology firm, is partnering with **Neustar**, a Washington, D.C., business information firm, to integrate Neustar's real-time data into Sorenson's Spark Enlight TV analytics products.

■ **Lightspeed GMI**, a Warren, N.J., research firm, will serve as the 2015 fieldwork partner for **Superbrands U.K.**, with its proprietary panels being used for the annual Consumer Superbrands, CoolBrands and Business Superbrands surveys.

New companies/new divisions/ relocations/expansions

■ **Integrated Strategic Information Services Inc.** (I.S.I.S.), a San Francisco competitive intelligence firm, has changed its name to **INOVIS** as part of a broad restructuring.

■ **HCD Research**, Flemington, N.J., has established a new division, HCD Neuro-Cognitive Financial Insights, headed by Steve Burns, vice president of business strategy. The division will integrate applied consumer neuroscience with traditional cognitive marketing research to better understand how consumers make decisions as to financial and insurance products.

■ London research firm **SPA Future Thinking** has opened a pharmaceutical health care division in Paris, Future Thinking Pharma. It will be led by Beatrice Chemla.

■ **Offerwise**, an Ashburn, Va., research firm, has opened a Sao Paulo office.

■ Research firm **Annik Inc.** has moved into a larger facility in Bellevue, Wash., which will serve as a delivery center as well providing more office space.

■ Nashville-based **20/20 Research** is opening a United Kingdom office to make its products and services more readily available throughout Europe, the Middle East and Africa. It will be headed by David Chandler, a U.K. market research veteran. Separately, 20|20 Research has moved its headquarters and focus group facility to the historic Frost Building in central Nashville, Tenn. The firm is leasing all 31,000 square feet of space and has updated the technology of the building.

■ **James Industry Research Group** (JIR Group), a marketing research consulting, design and management firm, has launched. The firm will specialize in convention and trade show research and was recently awarded contract as the exclusive preferred research vendor and research broker for Reed Exhibitions and will manage all research activities at Reed trade shows.

■ **B2B International,** Manchester, U.K., has opened an office in Singapore, to be headed by Stephanie Teow, who previously was a research manager in the U.K. office.

■ In Chicago, Tania Haigh has launched **Magnolia Insights**, a research agency specializing in marketing to women.

■ **ABN**, a Hong Kong research company, has opened an office in Indonesia, to be led by Kurt Thompson.

■ Research software provider **Dapresy** has opened a new office in Brisbane, Australia, led by Heath Adams as managing director, Australasia. The firm is headquartered in Norrkoping, Sweden.

■ Peter Brook has set up a new Fort Lauderdale, Fla., firm, **Travel Tech Strategies**. He will work with clients in the travel sector to collect and analyze large volumes of data to find market trends, customer preferences and other patterns.

■ Australia-based **Clinical Network Services** (CNS), which provides services in the planning, implementation and delivery of preclinical, Phase 1 and 2 trials, has established a new office in the U.S. under the name Clinical Network Services USA Inc. CNS appointed Megan Hill as business development manager in the U.S.

Research company earnings/ financial news

■ London-based researcher **BrainJuicer** announced its 2014 revenue increased 1 percent to £24.6 million. Its U.S. revenue increased by 5 to 6 percent on a constant currency basis. The company is predicting pre-tax profits for 2014 of at least £4 million.

■ **Mixpanel**, a San Francisco-based analytics firm, has raised $65 million in a new investment round.

■ **UniversalSurvey and SurveyHealthCare,** New York researchers, have completed an equity and debt funding round, intended for platform development and future mergers and acquisitions.

■ Lancaster, Calif.-based **Simulations Plus Inc.**, a provider of simulation and modeling software for pharmaceutical discovery and development, reported financial results for its first quarter of fiscal year 2015 ended November 30, 2014. Simulations Plus Inc. acquired Cognigen Corporation through a merger that closed on September 2, 2014, and the numbers presented here represent the consolidated financial results. Net revenues increased 54.7 percent, or $1.4 million, to $4.1 million from $2.6 million; $1.1 million of the increase was from Cognigen consulting revenue. Gross profit increased 40.9 percent to $3.1 million from $2.2 million; $600,000 of this increase is due to Cognigen revenue. Income before taxes and net income decreased approximately 22 percent due mainly to the effect of one-time charges for the Cognigen merger. As a result, diluted earnings per share decreased $0.01 to $0.03 from $0.04 per share. Without the one-time charges, diluted earnings per share would have been approximately $0.05 per share, up 58 percent.

■ **AppFlyer**, a mobile app tracking and analytics firm based in Israel, has raised $20 million in Series B funding which will be used to further develop its platform and open new offices.

■ Manchester, U.K., research firm **RealityMine** obtained $2.5 million of new investment funding, which has been earmarked for recruiting technical, sales and client support staff.

■ **GraphLab**, a Seattle-based software firm, has rebranded to Dato and has completed a $18.5 million Series B investment round.

CALENDAR OF EVENTS

••• can't-miss activities

The Big Rethink U.S. 2015 conference will be held **March 5** at the Time Warner Center in **New York City**. Visit http://econ.st/1CjT0lo.

Data Driven Business will hold its West Coast 2015 Summit, themed "Workforce and HR Analytics" on **March 9-10** in **San Diego**. Visit www.hr-analytics-summit.com/index.php.

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

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

The Pharmaceutical Marketing Research Group will hold an event, themed "PMRG's 2015 Healthcare Marketing Researchers Connect," formerly its annual national conference, on **March 15-17** at the Gaylord National Hotel, National Harbor in **Maryland**. Visit www.pmrg.org/EventsWebinars/2015PMRGConnect/tabid/872/Default.aspx.

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

Geoscape will hold a conference, themed "New Mainstream Business Summit," on **March 17-19** at the Mandarin Oriental Hotel in **Miami**. Visit www.cvent.com/events/11th-annual-new-mainstream-business-summit/event-summary-785c6aa055744e6ba45681e49a9ee338.aspx.

Osney Media presents its 14th annual TSAM Congress and Expo on **March 17** at the Lancaster Hotel, **London**. Visit www.osneybuyside.com/tsam-eu/.

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.

The Sustainable Brands Bangkok 2015 event will be held on **March 18-19** at the Plaza Thenee Bangkok in **Thailand**. Visit www.sustainablebrands.com/events.

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 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 Conference Board will hold its 11th annual customer experience conference, themed "Using analytics and culture to deliver journeys that customers crave," on **March 26-27** at the Conrad New York, **New York**. Visit www.conference-board.org/conferences/conferencedetail.cfm?conferenceid=2707.

The Qualitative Research Division of Canada's Marketing Research and Intelligence Association will hold its conference on **March 26-27** at the Hotel Novotel, **Toronto**. Visit qrc2015.mria-arim.ca/home/index.php.

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.

The Mystery Shopping Providers Association will hold its annual Europe conference on **April 17** in **Budapest**, **Hungary**. Visit www.mspa-eu.org/en/Upcoming_annual_conference.html.

Adaptive Path will hold its MX2015 Managing Experience Conference on **April 20-21** at the Parc 55 Hotel in **San Francisco**. Visit www.eventbrite.com/e/mx-2015-hosted-by-adaptive-path-tickets-14585133527.

ESOMAR will hold its annual Latin America conference, themed "Carnival of Insights: Celebrating Research," on **April 26-28** in **Sao Paulo, Brazil**. Visit www.esomar.org/events-and-awards.php.

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

Loyalty Expo will be held on **April 27-29** at the Loews Royal Pacific Resort at Universal Orlando, **Orlando, Fla.** Visit http://loyaltyexpo.com/.

IQPC will present a conference, themed "Market Research for Brand Innovation," on **April 27-29** in **Chicago** at The Hyatt Regency McCormick Place. Visit http://bit.ly/1AMmlnL.

Worldwide Business Research will hold a conference focused on digital marketing for financial services on **April 27-29** in **Miami**. Visit www.netfinanceus.com.

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

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BEFORE YOU GO ••• issue highlights and parting words

••• cover-to-cover

Facts, figures and insights from this month's issue

page 16

Social media posts often address a large audience of "friends" or "followers," which may encourage disproportionate self-presentation.

page 30

Perceptual mapping is a useful tool to plot current therapies against key product attributes and identify advantageous gaps in the marketplace.

page 38

In any new product launch upper management is impatient; they will be eager to see progress and from Day 1 will be asking to see data.

page 43

Manufacturers must adjust their strategies as well as their tactical approaches in order to be in successful partnerships with the ACO customer.

page 50

The good news for marketers is that word-of-mouth dynamics are highly effective in changing brand perceptions, as evidenced by the direct relationship between the two factors.

Discover MR's rich history

The marketing research industry has been developed by researchers with gumption, ambition and trailblazing attitudes that have helped pave the way for how things are done today. Longtime researcher Paul Scipione chronicles this rich history – the birth and growth of the marketing research industry – in his new book A Nation of Numbers – The Development of Marketing Research In America (published under the Quirk's Marketing Research Media banner).

Scipione's account digs into the MR industry's past to discover the creativity and hard work behind the analysis of numbers. Visit www.NationofNumbers.com to learn more.

It is better to know some of the questions than all of the answers. – James Thurber (submitted on LinkedIn by Judith Weber)

Coming in the April Quirk's

••• business-to-business research

Terry Grapentine explores his reservations about the Kano model and why he feels conjoint methods are better-suited to examining the kinds of product design questions typically addressed using Kano.

••• regional focus: china

China-based researcher Steven Hansen details his experiences conducting research in China and offers real-world advice on incentives, recruiting and translation.

••• business-to-business research

Sean Campbell looks at competitor research and the valuable insights you can learn from researching your competitor's customers.