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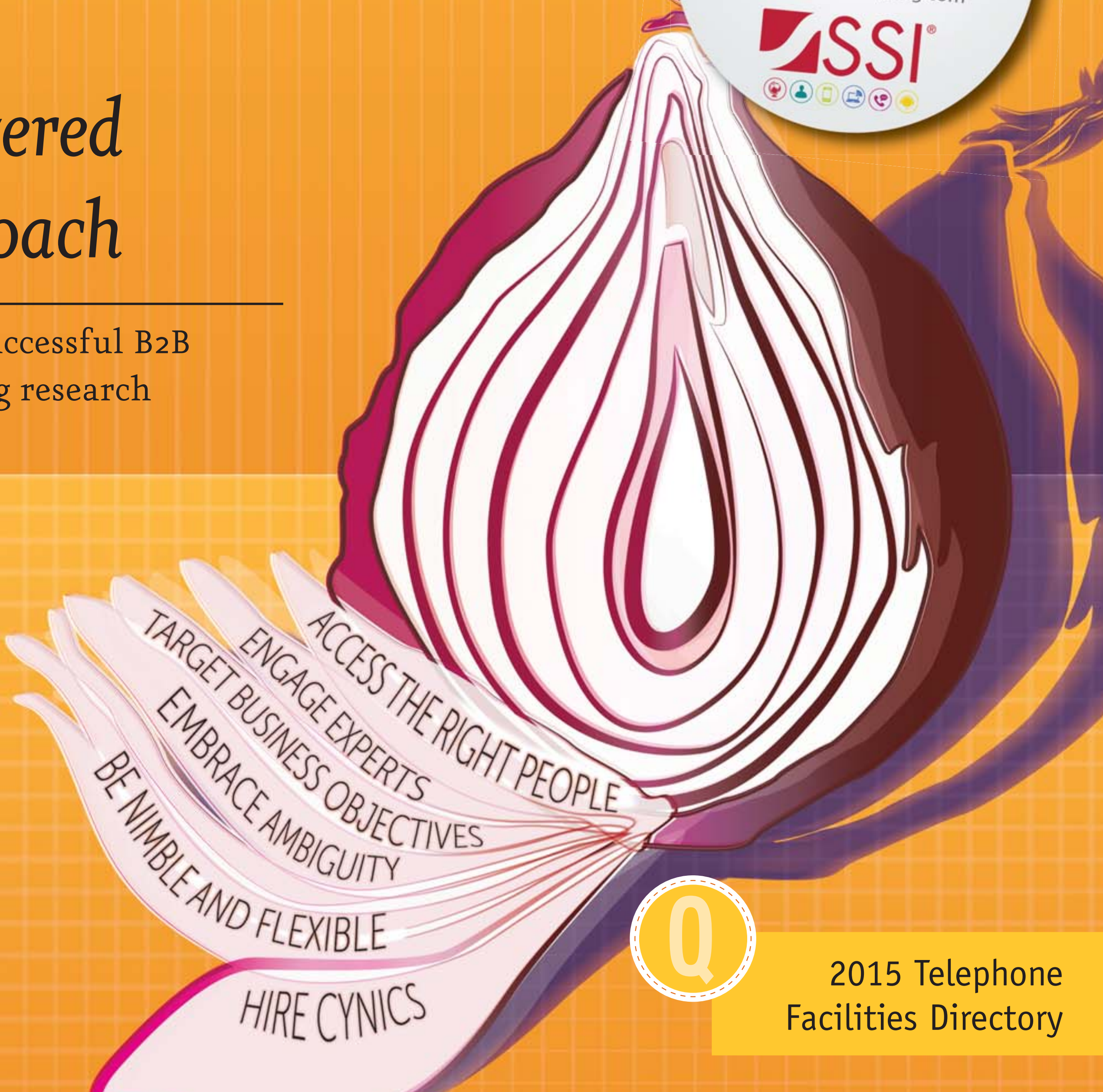

2015 Telephone Facilities Directory

April 2015
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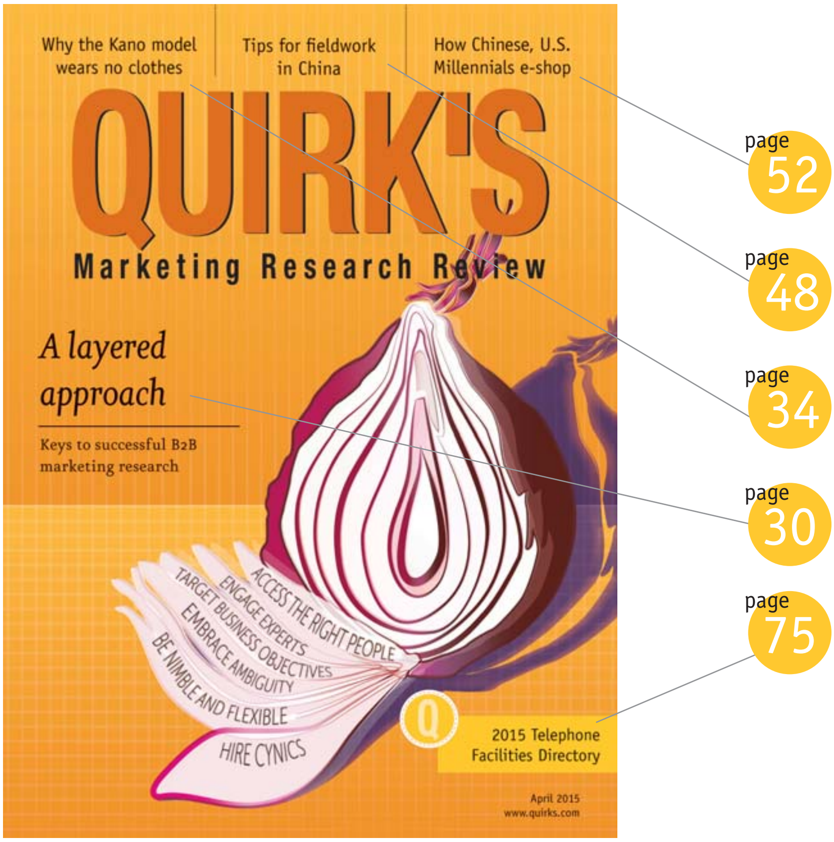

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Buzz from the #QuirksEvent

The #QuirksEvent was all a-Twitter as 1,012 attendees joined us in Brooklyn, N.Y., for the inaugural Quirk's Event on February 23 and 24. We asked you to share your thoughts and ideas throughout the event and we were humbled by the overwhelmingly positive tweets!

Many attendees shared tidbits during event workshops:

@davidpaull
Great use case RT @SteveAugust: Getting set for What Women Really want from Healthcare using Revelation #quirksevent

@MarketingMJR
Interesting topic & case study "@SSITweets: Self Reporting & Behavioral Data: Asymmetry or Alignment?- Katie Hansen @Etsy #quirksevent #mrx "

We were thrilled to see positive energy flowing after the event ended:

@saaron
Agree with @davidpaull: #quirksevent is one of the best organized & executed conferences/ events I've ever attended. Great job by @QuirksMR

@rsvpeterson
Congrats to @QuirksMR on a great event this week! #quirksevent

A huge thank-you to everyone who joined in on the #QuirksEvent conversation! We hope Twitter will continue to allow us to hear your thoughts and ideas in order to make Quirk's more valuable to you. If you haven't already, follow us on Twitter @QuirksMR.

// E-newsworthy

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••• shopper research

Supermarket tests Apple Watch messaging

Already famous for being the first retailer to use UPC bar code scanners in 1974, Indianapolis-based Marsh Supermarkets has now become the first to test sending messages to the Apple Watch, reports RetailWire's Tom Ryan.

Working with Los Angeles startup inMarket, Marsh installed beacons across its 75 stores. Shoppers who use Marsh's mobile app or one of the apps in inMarket's numerous applications will be able to decide if they want to receive push notifications on their Watch or smartphone when they enter the store.

Marsh decides which apps are triggered by the beacons and customers choose which apps work. If approved, a shopping list may pop up for a customer when they enter the store. Shoppers may also be pinged with recipe suggestions or offers in aisles.

Beacons present retailers with new tools to measure coupon and campaign effectiveness, down to timing and shopper proximity to products in aisles. With the software integrated with the retailer's CRM system, the offers can be tailored based on past purchases and further aligned to what products are in the aisle the shopper is walking down.

InMarket claims that in-store beacon engagements achieve a 45 percent interaction rate, or five times higher than traditional push messages that occur without location context.

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••• health care research

Researchers find our thirst trigger

Neurons that trigger our sense of thirst have been identified by Columbia University Medical Center neuroscientists, as detailed in a paper published in the online edition of *Nature*.

Researchers have long suspected that thirst is regulated by neurons in the subfornical organ (SFO), in the hypothalamus. Using optogenetics, which lets them control specific sets of neurons in the brain after inserting light-activated molecules into them, researchers Yuki Oka and Charles Zuker uncovered two types of neurons in the SFO that control thirst: CAMKII neurons, which turn thirst on, and VGAT neurons, which turn it off.

Shining light onto these molecules turns on the neurons without affecting other types of neurons nearby. When the researchers turned on CAMKII neurons, mice immediately began to seek water and to drink intensively. This behavior was as strong in well-hydrated mice as in dehydrated ones. Once the neurons were shut off – by turning off the light – the mice immediately stopped drinking.

"The SFO is one of few neurological structures that is not blocked by the blood-brain barrier – it's completely exposed to the general circulation," said Oka. "This raises the possibility that it may be possible to develop drugs for conditions related to thirst."

By Joseph Rydholm, Quirk's Editor

An event grows in Brooklyn

Joe Rydholm can be reached at joe@quirks.com

It's hard to pinpoint exactly when we realized it. Early in the morning of the first day, there was a palpable energy, a buzz in the exhibit areas and in the hallways and meeting rooms. And then the wonderful stream of exhibitors and attendees began stopping by our booth to confirm what we were hoping was true: The inaugural Quirk's Event was a rousing success.

Thinking about it later, I likened it to the feeling of hosting a huge party for all of your friends – you're surrounded by people you really want to sit and talk with but you have to keep running off to fill the punch bowl or refresh the chips and dip. And then, just when it seems like things are under control, people are packing up to go home and thanking you for the great time they had.

Of the many gratifying aspects of the February gathering in Brooklyn, perhaps the most was its inclusive, convivial feeling. We had intended it to be an event for the entire industry and, in addition to the exhibitors and attendees, we had representatives on site from other major industry conference organizing bodies along with groups from CASRO, the QRCA, ESOMAR and the research education programs of Michigan State University, the University of Texas at Arlington and the University of Georgia's Principles of Market Research course.

True, we had some stumbles. Food was an issue and we need to improve our signage to help people find the meeting rooms a bit more easily. But for a first iteration, things went remarkably well.

One of our main goals was to try to re-create, in conference form, the value proposition that we've always tried to deliver with our various Quirk's entities: practical, useful information that helps researchers do their jobs more effectively and that promotes the use and understanding of marketing research across a wide range of industries and applications.

As I've said many times, I've long been proud that we offer most of our resources free of charge, thanks to the support of our advertisers. And while we weren't able to offer free admission to The Quirk's Event, we heard over and over again that our low-cost registration rates for client-side researchers were a major draw. Companies were able to send their entire departments to the event and several client-side attendees said ours was the first MR industry conference they had ever attended.

That point about having several first-timers at our event brings me to the one criticism that I heard most often: some of the presentations were too basic. In every case, this opinion came from veteran research vendors who have a wealth of knowledge and who attend conferences to learn new things. I would respectfully disagree with their view on the presentations – as a whole I think the workshops addressed a range of interest areas and offered something for everyone. But the comments did get us thinking about things we can do a bit differently at future events by gearing or labeling a track or a series of talks for specific audiences or experience/knowledge levels.

No matter who a presentation is aimed at, we always hope that it is educational, as educating researchers was one of Tom Quirk's primary goals when he started the magazine in 1986.

That aim was further advanced at The Quirk's Event by the launch of the Marketing Research Education Foundation (MREF), the mission of which is to "unify, inspire and activate the marketing research community to focus its collective financial and human resources behind the goal of transforming the lives of children worldwide through education." Quirk's was proud to donate $10,000 of the Event profits to MREF. (Contact Don Marek at djmarek@gmail.com for more information on the organization.)

We'll be back in Brooklyn next February. If you couldn't make it this year, we hope you'll join us then. In the meantime, as always, we welcome your ideas and suggestions on how we can make the next Quirk's Event even better than the first one.

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BALTIMORE
AIM
Baltimore Research (Towson, MD)

BOSTON
Copley Focus
Fieldwork Boston (Waltham)
Focus Pointe Global
Murray Hill National
Performance Plus (Downtown, Framingham)
Schlesinger Associates

CHICAGO
AIM (Schaumburg)
Adler Weiner (Downtown, Lincolnwood)
Chicago Focus
Fieldwork Chicago (Downtown, North, O'Hare, Schaumburg)
Focus Pointe Global (Downtown, Oak Brook)
Focuscope (Downtown, Oak Brook, Oak Park)
Murray Hill National
Plaza Research
Schlesinger Associates (Downtown, O'Hare)
Smith Research (Downtown, Deerfield, Oakbrook)
Survey Center
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CONNECTICUT
MarketView (Danbury)
Murray Hill National (Hartford)
New England Marketing Research (Norwalk)
Performance Plus (Enfield)
Razor Focus (Stamford)

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Plaza Research

FLORIDA
Concepts in Focus (Jacksonville)
L&E Research (Tampa)
MARS Research (Ft. Lauderdale)
National Opinion Research (Miami)
Plaza Research (Ft. Lauderdale, Tampa)
Schlesinger Associates (Orlando)
Superior Research (Tampa)
WAC (Ft. Lauderdale, Miami)

LAS VEGAS
Plaza Research

LOS ANGELES
AIM (Costa Mesa, Long Beach, Los Angeles)
Adept Consumer Testing (Beverly Hills, Encino)
Adler Weiner (Downtown, Irvine)
Advanced Marketing Perspectives
Fieldwork LA (Irvine)
Focus & Testing
Focus Pointe Global
House of Marketing Research (Pasadena)
Meczka Marketing Research
Murray Hill National
Plaza Research
Q-Insights
Schlesinger Associates

MINNESOTA
Ascendancy Research (Minneapolis)
Fieldwork Minneapolis (Edina)
Focus Market Research (Edina, Minneapolis)
Focus Pointe Global (Minneapolis)
FRS Research Group (St. Paul)

MISSOURI
Focus Point Global (Kansas City, St. Louis)
Hatch Research (St. Louis)
L&E Research (St. Louis)
Peters Marketing Research (St. Louis)
Schlesinger Associates (St. Louis)

NEW YORK
Fieldwork New York (Westchester)
Focus Pointe Global
Focus Suites
Fusion Focus
Innovative Concepts (Long Island)
JRA (White Plains)
MarketView (Tarrytown)
Murray Hill National
New York Consumer Center
Schlesinger Associates
The Focus Room (NYC, Westchester)

NEW JERSEY/ NEW YORK (Metro Area)
AIM (Hackensack, NJ; Morristown, NJ)
Fieldwork East (Ft Lee, NJ)
Focus Crossroads (East Rutherford, NJ)
Focus Pointe Global (Teaneck, NJ)
Focus World International (Holmdel, NJ)
Meadowlands Consumer Center (Secaucus, NJ)
Plaza Research (Paramus, NJ)
Schlesinger Associates (Iselin, NJ)

NORTH CAROLINA
L&E Research (Charlotte, Raleigh)

OHIO
AIM (Cincinnati, Columbus)
Complete Research Connection (Columbus)
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QFact Marketing Research (Cincinnati)

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JRA (Montgomeryville, PA; Mount Laurel, NJ)

PHILADELPHIA
Focus Pointe Global (Center City, Bala Cynwyd)
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JRA
Schlesinger Associates (Center City, Bala Cynwyd

PHOENIX
Fieldwork Phoenix (Scottsdale, South Mountain)
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RHODE ISLAND
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Plaza Research
Taylor Research

SAN FRANCISCO
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Plaza Research
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SEATTLE
Fieldwork Seattle (Downtown, Kirkland)
Northwest Insights

TEXAS
Austin Market Research (Austin)
Fieldwork Dallas
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VIRGINIA
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WASHINGTON, D.C. (Metro Area)
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Shugoll Research (Alexandria, VA; Bethesda, MD; Fairfax, VA)

WISCONSIN
Focus Pointe Global (Appleton)
JRA (Milwaukee)

UNITED KINGDOM

Aspect in the City (Manchester)
Aspect Viewing Facilities (South Manchester)
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London Focus (London)
Shoreditch Studios (London)
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// Survey Monitor

••• sensory research

What are the flavor trends for 2015?

Beyond Savory 2.0

Using formal and grassroots market research tactics, Sensient Flavors and Fragrances says it has identified four primary consumer interests – hybrid flavors, regional inspiration, creative sourcing and savory updates – that inform eight up-and-coming flavor trends for 2015.

As detailed by Ian McMurray of Ingredients Network, hybrid flavors, or unconventional flavor pairings, will remain popular through the year ahead. Specifically, Sensient predicts the following two flavors will be on the rise:

Smoked chantilly – Food menus continue to feature smoked, roasted, toasted and burnt flavors. Pairing this profile with vanilla- or brandy-infused chantilly cream evokes a new level of interest by combining two unexpected, but harmonious flavors.

Maple mirch (mirchi) – The popularity of Indian cuisine is growing as consumers learn the depth and breadth of this particularly rich heritage. Mirch, Hindi for chili pepper, brings spice and heat from India and combines it with maple, a fan favorite in the Western world. This East-meets-West hybrid pairs the familiar sweetness with the exotic Indian flavor creating something consumers will be eager to try.

Consumers are also becoming more curious about regionally-inspired flavors as they look to food as a gateway to the world's cultures. In 2015, regional flavor trends take their cues from the equator:

African blue basil – A perennial basil, this variety is a sterile hybrid of two breeds that yields an unexpected flavor with anise undertones.

Falernum – Falernum is a sweet syrup boasting hints of almond, ginger, cloves, lime, vanilla and allspice. It's often paired with rum in Caribbean and tropical drinks but it's popping up in non-alcoholic beverages like coconut water and is expected to hit the food market in coming years.

Long winters and droughts are forcing manufacturers to consider alternative food sources and become more conscious of sustainable resources. Specifically, desert plants are rising in popularity:

Desert wildflowers – Though polarizing, floral flavors are on the rise for 2015 and the mild flavor of the desert wildflower makes it a popular pick that can be enjoyed by all.

Cascara tea – Commonly consumed in Bolivia (where it's called sultana), cascara tea is made from the dried berries of the coffee plant and is often mixed with cinnamon.

Category-blurring flavor trends like "Savory 2.0" are firing on all cylinders. As consumers take inventory of their pantries, savory updates on traditionally sweet applications are proving to be viable alternatives as long-term staples. Whether it is sugar replaced with salt or repurposing more familiar flavors, this trend will include:

"Everything bagel" spice blend – A longtime favorite, this versatile spice blend contains poppy seed, kosher salt, sweet onion sugar, sesame seed, garlic, onion and fennel.

Salted satsuma – The perfect balance of sweet and savory, the addition of salt elevates this summertime favorite. Satsuma, a Japanese orange varietal, gained popularity in New Orleans in re-

quirks.com/articles/2015/20150403


Measured
Focused
Crafted

cent years. It is another citrus expected to appear in flavor undertones in 2015.

The consumer insights were developed utilizing Sensient's Trends to Taste program, a proprietary predictive process that filters trends from the broad, consumer, macro level down to finished concepts that best demonstrate each flavor profile.
www.sensientflavorsandfragrances.com

••• retailing research

Consumers still not sold on mobile payment

More education needed to reach critical mass

A lack of awareness may stand as a significant barrier to the use of mobile payment at stores, according to a newly-released consumer survey, reported CSP Daily News. The study, commissioned by San Jose, Calif.-based electronic payment firm Verifone, showed half of the consumers polled were unfamiliar with mobile technologies such as near-field communication (NFC) and mobile wallets. Similarly, half of the respondents said they were unlikely to shop in a store because it used in-store tracking technology to provide offers on mobile devices.

"This is a classic case of new technologies needing to reach critical mass before consumers come on board," says Joe Mach, senior vice president and general manager of vertical solutions at Verifone. "Today, in 2015, the pieces are fitting into place. What's essential now is for the industries driving the mobile payment revolution, from finance to retail to systems providers, to educate consumers on mobile payment's benefits and easy use."

Conducted online by Wakefield Research, Arlington, Va., among 1,000 adults 18 and older, the survey took place between December 16-23, 2014, timed to coincide with maximum consumer interest in retail payment options.

More than half of the respondents (53 percent) said it was important for more stores to install devices that enable consumers to pay with their smartphones, indicating wide receptivity to mobile pay options once they are provided. The response was significantly higher among younger consumers, with 64 percent of respondents aged 40 and below agreeing that more stores should install devices that allow customers to use smartphones to pay.

Additionally, 84 percent of the respondents said they would use their smartphones to pay for small and medium purchases, such as a cup of coffee or pair of jeans.

Other key survey data points included:

Credit and debit cards remain the primary method of payment for 63 percent of all survey respondents, with 6 percent favoring alternative payment options such as PayPal, and 4 percent preferring mobile wallet services.

A total of 54 percent of the survey respondents are familiar with Europay MasterCard Visa (EMV) technology, a payment method that enhances data security. Of this group, 39 percent use credit or debit cards that have EMV chips as their primary or secondary payment method; among respondents under 40 years of age, 49 percent use credit or debit cards that have EMV chips as their primary or secondary payment method.

More than half of the respondents, 56 percent, are willing to continue shopping at a store whose credit card information was stolen; the number of consumers who are less likely to continue shopping at such a store was 44 percent.

Among the advantages cited to using smartphones instead of traditional payment methods, speed of use ranked first (34 percent), followed by freedom from carrying a wallet (29 percent), access to mobile deals (24 percent), ease in tracking spending (23 percent) and safety of personal data (18 percent).

"The survey data illustrate a typical early adopter scenario – high awareness among younger consumers, which is the essential precursor to mass market adoption," says Mach. "The mobile payment industry is an industry on the cusp, with so many components essential to success, such as EMV and ApplePay, coming into focus for the first time and delivering real value to the end user."

Wakefield Research engaged survey respondents first with an e-mail invitation, followed by a 13-question online survey. Magnitude of variation is approximately 3.1 percentage points. Survey data breakouts are available by gender, age, geographic region (Northeast, South, Midwest and West) and regional character (urban, suburban and rural).

••• retailing research

Study shows store remodels pay off

We like what you've done with the place

A study conducted by Tracey Dagger and Peter Danaher of Monash University, Melbourne, Australia, found that after remodeling the retail environment, sales to new customers increased by up to 44 percent, while sales to existing customers increased by 7 to 10 percent. These additional benefits persisted for at least a year following the remodel.

As reported by Australia-based *Marketing* magazine, other findings included:

New customers to the remodeled stores increased from 13 percent to 17 percent; new customers visited the remodeled stores 16 percent more than before, compared with a 2 percent increase for existing customers; and new customers increased their spending by 14 percent, whereas existing customers did so by 7 percent.

New customers had much higher perceptions of the remodeled stores' retail environments (including atmosphere and layout), service quality and customer satisfaction than existing customers. But the study found no difference in short-term behavioral intention.

On average, retailers remodel their stores every seven to 10 years. Dagger recommends that managers view store remodeling as a strategic marketing investment rather than "a necessity to endure." "The in-store experience continues to have high relevance; retailers must keep their appearance modern, fresh and in line with that of competitors. The look, feel and mood of a firm's retail or service environment are unique and crafted purposefully to contribute to the brand and ultimately, its profitability," she says.

The researchers collected information at two different retail stores before and after remodels in order to draw their conclusions.

Study 1 looked at an equipment retailer and service provider in a worldwide industry worth $100 billion annually. Its store remodel involved moving the retail servicescape into a previously unused area of the store including opening the store via a different door. It took about one month to complete.

Before the remodel, immediately afterwards and 12 months afterwards, customers to the store were given surveys to complete either in-store or return via postage-paid envelope (1,666 customers were surveyed).

Study 2 looked at a large department store in a shopping mall of a major metropolitan city, with combined annual sales of more than $3 billion. This store's remodel was much more significant than the first, as was its data collection method.

The store's outdated decor underwent an eight-month transformation including a redesigned store layout, new lighting, floor coverings, decor, furniture, fixtures and fittings, upgraded fitting rooms, parents room and employee areas, redecorated and painted walls and ceilings, remodeled kiosks and retrofitting heating and air conditioning systems.

The study also compared another of the retailer's stores as a control store, since the remodel caused significant disruption to the store during the eight months, and to account for external factors including seasonality, advertising and promotions. The control store was in a similar suburb, of a similar outdated condition, with similar products, sales and customers.

Rather than handing out surveys to collect a sample, the study used data from the retailer's loyalty program, of which 70 percent of customers are a member, to collect a census of all transactions for 12 months before remodeling and eight months during and 12 months after (May 2010 to December 2012).

••• shopper research

Are stores overmatched on price-matching?

Consumers like to compare

As reported by Helen Leggatt of BizReport, almost three-quarters of U.S. shoppers (71 percent) Webroom specifically to compare prices, according to Displaydata, and 32 percent admit to showrooming to compare prices. Such behavior is causing headaches for physical stores that can't roll out changes to prices or promotions with the same speed as online stores.

Consider this: While Amazon makes pricing changes 2.5 million times each day, physical stores such as Walmart and Best Buy currently only make about 50,000 price changes per month.

Displaydata's report, Rethinking Retail: Getting the In-Store Price Right in a Digital Age, the second in a series, states that "because digital platforms can react quickly and flexibly to variables such as competitor pricing, stock availability, sell-by dates and inclement weather, there is a perception among consumers that stores aren't offering the same value for the money."

According to the report, 42 percent of U.S. shoppers believe retailers offer different prices online than they do in-store and 72 percent have been deterred from making a purchase in-store because they think the price is too high.

This is where electronic shelf labels can play a major role in the in-store shopping experience. As well as providing dynamic pricing across all stores, they enable retailers to keep pricing aligned with online and even display real-time competitor pricing to reduce the likelihood of showrooming. "At the end of the day, whether they are looking for the lowest price, the largest quantity or the latest promotion, today's consumers crave clarity and value in all channels," concludes Displaydata in its report. "Electronic shelf labels are enabling omni-channel retailers to offer transparency and clarity in the store, ensuring the price is right at every touchpoint."

••• shopper research

Online is great but stores still matter

Smartphones used for researching products

Despite all the pressure that brick-and-mortar retailers are feeling from online and mobile commerce, physical stores are still the primary place shoppers turn to buy things, according to an annual consumer survey by PricewaterhouseCoopers.

The Total Retail: Retailers and the Age of Disruption report, as reported by PYMNTS.com, found that only 27 percent of U.S. respondents buy products online every week, up from 23 percent a year ago, but well below the 37 percent who shop in-store every week. And fewer people say they get lower prices or better deals online than in-store than a year ago – 52 percent, down from 59 percent.

Another sign of brick-and-mortar's strength: While 68 percent admit to having ever engaged in showrooming – shopping in-store and then buying online – 73 percent said they had done the reverse (the top reasons: instant, no-cost delivery and the ability to see or try on products in the store).

And while mobile devices are rapidly becoming an integrated part of many U.S. consumers' shopping experience, more than half of U.S. consumers never buy using smartphones (53 percent) or tablets (55 percent). In contrast, 94 percent of consumers say they have bought online using a PC. But 46 percent of U.S. consumers said they have researched products on their phones and 45 percent have used their phones for price comparisons.

Social commerce and mobile payments are still in their early days as shopping tools and the survey shows it. Only 4 percent of U.S. consumers said they've bought something directly through social media, although 35 percent said social media has spurred buying in at least some cases. (Facebook is the overwhelming favorite for social media, with 50 percent saying it's regularly part of their shopping experience.)

••• consumer psychology

Plane passenger proximity propels purchases

By buy

Airplane passengers are 30 percent more likely to purchase in-flight amenities, like snacks and entertainment, if another passenger next to them makes a purchase first, Mashable reported.

That's the conclusion of new research out of Stanford University, which looked at purchases on 2,000 flights. Pedro M. Gardete, assistant professor of marketing at the Stanford Graduate School of Business, analyzed the data that included 65,525 purchases by 257,000 airline passengers. "Because the transactions were made with via credit card, Gardete had precise information about the transactions, including the buyers' flight numbers, seat numbers, what they bought and what time they bought it," writes Eilene Zimmerman, for the business school's publication.

For airlines, ancillary revenue – money made from selling extras like food, beverages, entertainment and seat upgrades – is more than a side business: Airlines made more than $31 billion on "extras" in 2013.

"Without ancillary revenue, the airline industry would be at a loss overall," says Jay Sorensen, president of IdeaWorks, a company that tracks ancillary revenue.

That revenue has been growing fast in recent years and airlines want the trend to continue. "We know now people are prone to social influence," says Gardete. "This is the bread and butter of marketing companies right now, as they try to find the best way to approach consumers."

Marketers are interested in showing how companies can influence customer decisions to make them purchase more but Gardete's research can also serve as a warning to passengers. So next time you're flying, ask yourself – did you really want to buy that cheese tray before your neighbor ordered one?

Gardete's study will be published in the *Journal of Marketing Research*.

••• science and tech

Pew study examines scientists' view of media, public

Seeking engagement with wider audiences

American scientists believe they face a challenging environment and the vast majority of them support the idea that participation in policy debates and engagement with citizens and journalists is necessary to further their work and careers, according to a report by Lee Rainie, Cary Funk and Monica Anderson of Pew Research.

A survey of 3,748 American-based scientists connected with the American Association for the Advancement of Science (AAAS) finds that 87 percent agree with the statement "Scientists should take an active role in public policy debates about issues related to science and technology." Just 13 percent of these scientists back the opposite statement: "Scientists should focus on establishing sound scientific facts and stay out of public policy debates."

This widely-held view among scientists about active engagement combines with scientists' perspectives on the relationship between science and society today in several ways.

Most scientists see an interested public: 71 percent of AAAS scientists believe the public has either some or a lot of interest in their specialty area.

Many scientists see debates over scientific research findings in the media: 53 percent of AAAS scientists say there is a lot or some debate in the news about their field.

A sizable share of scientists believe careers can be advanced by media coverage of their work and social media use: 43 percent of AAAS scientists say it is important or very important for scientists in their specialty to get coverage of their work in news media, up from 37 percent who said that in a 2009 survey. Some 22 percent described it as either "very important" (4 percent) or "important" (18 percent) for career advancement in their discipline to promote their findings on social media such as Facebook or Twitter. Still, a majority of AAAS scientists say it is not too or not at all important for career advancement to have their research covered in the news (56 percent) and 77 percent say it is not too or not at all important for career advancement to promote their findings on social media.

At the same time, most scientists believe that science news coverage can pose problems for science: 79 percent of scientists believe it is a major problem for science that news reports don't distinguish between well-founded and not well-founded scientific findings. Further, 52 percent of scientists say that simplification of scientific findings is a major problem for science in general.

These insights come at a time when science topics are increasingly part of the public debate. Pew Research findings from this survey showed an overall drop among AAAS scientists in how they rate the state of science in general and their particular scientific field. Scientists also express concerns about the precarious state of research funding, some of the influences on how funding is allocated and difficulties they feel hinder the capacity of science disciplines to attract the best talent to the field.

Nearly all the AAAS scientists (98 percent) say they have some level of interaction with citizens at least from time to time and 51 percent have at least some contact with reporters about research findings.

In addition, nearly half of AAAS scientists – 47 percent – use social media to talk about science or read about scientific developments at least some of the time. Some 24 percent of these AAAS scientists blog about science and research.

The scientists who are most likely to be involved in public activities show distinct patterns by age, by the level of public debate and public interest they perceive in their specialty and by discipline. Virtually all scientists engage with citizens. Mid-career and older scientists are especially likely to speak to reporters. Younger scientists are more likely to use social media. And blogging is something that equally spans the generations under age 65.

There is also evidence in the survey that the most engaged often use multiple methods and platforms to connect with the public. In other words, those who want to engage tend to do so in multiple ways.

Some 41 percent of AAAS scientists report that they "often" or "occasionally" do at least two of these four activities: 1) talk with non-experts about science topics, 2) talk with the media, 3) use social media or 4) blog. Nearly half, 48 percent, do one of these four activities either often or occasionally, and 11 percent do none of these on an "often" or "occasional" basis. Those who are more engaged by this metric are slightly younger; 46 percent of those ages 18 to 49 and 44 percent of those ages 50 to 64 are more engaged, compared with 33 percent among those ages 65 and older. A somewhat larger share of women (44 percent) than men (39 percent) report doing at least two of these activities on a more frequent basis.

Traditional information and peer networking activities are the most common ways scientists stay up-to-date. However, digital methods are now a common part of the learning toolkit for many scientists. Fully 84 percent of AAAS scientists read journal articles outside of their primary fields or scientific discipline. In addition, 79 percent say they attend professional meetings, workshops and lectures.

At the same time, digital communications are also a common part of the learning activities of scientists as they connect with peers: 58 percent get e-mail alerts from journals in their specialty; 56 percent get e-mails from general science journals; 32 percent belong to e-mail listservs; 19 percent follow blogs by experts their fields; and 12 percent follow tweets or other postings in social media by experts in their field.

The survey of scientists was conducted online with a random sample of 3,748 U.S.-based members of the American Association for the Advancement of Science (AAAS) from September 11 to October 13, 2014. The survey was conducted under the direction of Princeton Survey Research Associates International.

IN FOCUS

Product and Service Update

••• advertising research

IAB weighs in on native advertising

Aiming for transparency

The Internet Advertising Bureau (IAB) has released the first set of guidelines on native advertising, to aid advertisers, publishers, agencies and advertising technology firms in making native advertising more transparent. The guidelines are intended to make it easier for consumers to spot native advertising, where digital ads are designed to look and feel like editorial content. "The guidelines help companies involved in developing and publishing such native ad formats to provide the necessary levels of transparency to consumers and uphold the integrity of online advertising," said Alex Stepney, public policy manager at the IAB. The guidelines were based on a study by London research agency 2CV which examined consumer knowledge, attitudes and tolerance to native advertising. The remaining guidelines are due to be published in the second quarter of 2015.
www.iab.net/nativeadvertising

quirks.com/articles/2015/20150404

••• technology research

Capture data from the Internet of Things

IT for the IoT

Software AG, Darmstadt, Germany, and Wipro, a Bangalore, India, technology firm, have partnered to design a platform for streaming analytics providing real-time feedback for the Internet of Things (IoT) market. The tool, Wipro Looking Glass, embeds Software AG's Streaming Analytics product suite, which is designed to integrate, capture, analyze and respond to IoT data. The solution components include a real-time analytics engine, in memory database technology, a real-time user interface and mashup technologies. Wipro Looking Glass can be run both on-premise as well as hosted in a single cloud or multiple clouds simultaneously. The foundation framework allows the development of customer-specific solutions and with cloud-hosted analytics and algorithms that are accessible by digital sensors and devices, actions like process updates, event responses and machine behavior can be easily implemented.
www.wipro.com

••• hispanic research

Service tests movie trailers with Hispanic viewers

Spanish-dominant and bilingual

ThinkNow Research, Los Angeles, has launched MovieLink, a service for testing movie trailers with Hispanic viewers. Within a few days of receiving the trailer, the firm provides a report with responses from both Spanish-dominant Hispanics and bilingual Hispanics, drawn from its proprietary online panel, DigaYGane.com. Key measures include: interest in seeing the movie; when they would see the movie; motivators to see it; movie companion who would accompany them; acquaintance perception; movie description; trailer likes/dislikes; movie elements; and custom assessments as measured through customized questions related to the movie (movie themes, actors, music, etc.).
www.thinknowresearch.com

••• eye-tracking research

Tobii Dynavox offers entry-level eye-tracker

Helps new users get comfortable

In Stockholm, eye-tracking technology firm Tobii Dynavox has launched an entry-level peripheral eye tracker, Tobii Dynavox PCEye Explore. With the PCEye Explore, young or inexperienced users get a simple, no-fail way to learn how to use eye-tracking and gaze interaction. At the same time, they also become prepared for augmentative and alternative communication. The PCEye Explore lets users move the mouse pointer and perform left-clicks using only their eyes. This basic functionality, in combination with the compatible third-party software titles and Web pages, is designed to bring excitement and fun to end users, instead of work, repetition and effort. Engagement can start with simple cause and effect – look at the screen and something happens. A visible mouse cursor tracks where the user is looking so you can see if a user is responding and react-

ing appropriately. Use the optional Tobii Dynavox Gaze Viewer for more detailed analytics and for making and saving reports as still images or video sequences. And by introducing active targeting, users becomes familiar with the interaction process between his or her eyes and the screen.
www.tobiidynavox.com/explore

••• competitor research

Track online reviews of your products, competitors'

Tool uses NLP, machine learning

Sunnyvale, Calif., software firm BirdEye has introduced its Competitor Analytics tool, which allows marketers to monitor reviews of their own products as well as competitor's brands. Using keyword analysis, companies can mine customer feedback from hundreds of review sites. The tool consists of reports and insights featuring a range of benchmarking charts and metrics, including:

Competitors, reviews and ratings. Enterprises compare their reviews and ratings performance against competitors at brand level, location level and product level. Reviews and ratings reports include filters for locale (state, city), review source and time period. At-a-glance charts with drill-down data points measure performance in competitive ranking, reviews over time and rating over time.

Competitors, keywords. BirdEye uses natural language processing with machine learning to assess customer sentiment from keywords within customer reviews. Enterprises can pull competitive charts and graphs for frequent keywords, positive keywords and negative keywords to gain insight into competitors' strengths and weaknesses. Filters offer broad or dialed-in views by product, location, time period and review source.

Competitors, categories. Through competitive analysis of categories, enterprises gauge how they stack up against competitors on selected categories. The Relative Performance chart shows where on the continuum of "under performs" to "over performs" the enterprise is versus the industry. The Absolute Performance chart shows how the enterprise is faring on sentiment score on a scale of 1 to 5 versus its top competitors.
birdeye.com

••• social media research

Orgs collaborate on guide to social media measurement

Groups include Twitter, Facebook, MRS

Twitter and Facebook have collaborated with the Market Research Society, the Institute of Practitioners of Advertising and the Marketing Society, London, to produce The Short Guide to Measuring Not Counting – How to Evaluate Social Media for Marketing Communications. The guide is aimed at helping marketers assess the impact of social media using traditional marketing measurement rather than relying on numbers of clicks and offers seven guidelines, including "avoid a siloed approach," "the value of social will lie in the richness of its data" and "even short-term results need a long-term context." The short guide is available to purchase for £25 for MRS members and £50 for non-members. A longer specialist "expert" version of the guide aimed at agency planners can also be purchased. The authors of the guide are Ray Poynter, The Future Place, Nottingham, U.K., Simeon Duckworth, MindShare, London, and Fran Cassidy, The Cassidy Partnership, London.
www.mrs.org.uk

••• grocery research

Tool keeps tabs on CPG product debuts

Shoppers report on new items

Instantly, Los Angeles, has introduced Instantly Product Watch, an early-detection tool which alerts CPG companies to the launch of competing products. Companies can subscribe to one or several data sets and follow the live crowdsourced information feeds over time and across any region. Instantly collects this data directly from its mobile audience of shoppers in grocery stores every day, reporting on newly introduced items. Product Watch also collects product images, pricing data, success prediction metrics and feedback from shoppers on purchase intent. Instantly is uSamp's new name after its recent rebranding.
www.instant.ly/tools

••• qual/quant research

Study looks at what's new in MR

Draws on feedback from 58 companies

Best Practices, a Chapel Hill, N.C., management consulting firm, has released a summary of its study of new qualitative and quantitative techniques for consumer marketing research, Consumer Marketing Research Innovation: Assessing New

Tools, Technologies and Approaches to Understand and Communicate with Consumers. It reviews trends in consumer research and communication and looks at which research approaches are being used most frequently for forecasting, positioning, segmentation, brand research and concept testing and why they were chosen. The study includes data on three segments: pharmaceutical companies, non-pharmaceutical companies and the total benchmark class. Feedback from market researchers at 58 companies was collected through a benchmarking survey instrument as well as interviews with eight selected respondents to collect data and insights. A complimentary report excerpt can be downloaded at www3.best-in-class.com/rr1331.htm.

••• Briefly

■ London research company Kantar Worldpanel has launched an out-of-home panel in China to collect data on consumer purchasing and consumption of snacks and beverages. Data from 4,000 urban consumers will be collected through smartphones, providing information on the product they consumed, where, when and why.
www.kantarworldpanel.com

■ In Eindhoven, the Netherlands, software company CMNTY Corporation has introduced CMNTY Market, which allows researchers to create a customized platform for their online communities. The researchers can select specific modules and analysis tools according to their project.
www.cmnty.com

■ The London-based Market Research Society has produced five short films which review guidelines for researching children, designed to promote ethically-driven standards in the field. The videos cover issues of gaining consent and permission, offering incentives and rewards and potential drawbacks to using digital media to research the market. The films are available at mrs.org.uk/campaign/video/kids.

■ Point-Blank International, a Berlin-based qualitative research firm, is utilizing a new methodology involving the use of LEGO bricks in creative group discussions. The LEGOs are used to stimulate the respondents' imaginations and creativity.
www.point-blank-international.com

■ Dallas-based Usability Sciences has developed a method of collecting in-store consumer feedback by having shoppers complete a survey on their experience using their phones to capture photo and video while shopping. The respondents are part of a nationwide panel and they are shopping in geo-fenced stores. The research method is part of the company's omni-channel research solution.
www.usabilitysciences.com

■ GeoPoll, a Denver technology firm, is partnering with Control Union, a London specialist in agricultural certification, food safety and sustainability, to engage smallholder farmers in emerging markets. Their goal is to reach 1 million farmers by 2020 via SMS and voice messaging. The partnership will allow exporters, suppliers, government agencies and non-profits to provide and receive information from the farmers and will empower the farmers to gain access to markets.
http://research.geopoll.com

■ New York researcher Nielsen plans to invest $SG 14 million ($11.2 million) over the next five years to launch an Asia Innovation Center in Singapore to encourage the development of new research and measurement techniques for companies across the continent. The center will be similar to Nielsen's U.S. Innovation Lab, opened in 2012 in collaboration with the Stanford Graduate School of Business. Initial projects will include a tool for cross-platform audience measurement and effectiveness, a card-measurement platform for the financial services sector and a retail distribution modeling service using geo-satellite technology.
www.nielsen.com

■ ORC International, a New York research firm, has introduced a customer-centricity tool for companies to assess and improve their employees' performance. The online tool queries employees as to communication, empowerment, management behaviors, people-processes and customer vision and is designed to be used with employees having various functions and seniority levels. The results are analyzed and generate action-oriented reports. ORC used responses from a panel survey of 1,000 individual employees in the U.K., U.S., Australia and Hong Kong to design the 30-item questionnaire.
www.orcinternational.com

■ Evenbreak, a West Midland, U.K. staffing specialist, has joined with London recruitment firm Saros to increase the number of disabled people participating in research projects. The partnership will allow Saros to recruit for projects where the viewpoint of disabled people is specifically required but also for all projects. Saros also cited benefits to including disabled people in that they tend to be creative and resourceful, qualities valued in participants by researchers.
www.evenbreak.co.uk

■ Bangalore, India, research firm Borderless Access has added consumer opinion panels in Australia, Singapore and Thailand, bringing its coverage to 20 countries.
www.borderlessaccess.com

■ The BBC, London, has launched

the BBC Taster Web site, designed to test pilots and prototypes from the BBC and its partners. The site content will emphasize interactive and short-form features in a range of formats, such as mashups, radio shows and interactive digital poetry. The platform encourages users to rate the content and share it with others and may enable the BBC to reach a younger demographic and better understand their preferences.
www.bbc.co.uk/taster

■ Reston, Va., research company comScore is making available its comScore Trust Profiles as part of its Industry Trust Initiative, designed to enable advertising transactions between buyers and sellers. The Trust Profiles include key advertising metrics available in programmatic trading platforms, such as non-human certifications, top properties rankings, viewability and demographic statistics. Publishers who are comScore clients are able to view their own Trust Profiles in the comScore interface. The Profiles will first be available in MediaMath, Turn, The Trade Desk, Rubicon Project and Eyereturn Marketing.
www.comscore.com/industry-trust

■ Facebook has launched a standalone app, Facebook Lite, specifically designed for Android devices in emerging markets. It accommodates low-end and dated Android phones with 2G or poor Internet connections and is now being tested in several Asian and African countries, including Bangladesh, Nepal, Nigeria, Sri Lanka and Vietnam.

■ Full Circle Research Co., Potomac, Md., has implemented Verity, the Imperium quality control software, throughout its recruitment and validation process. Verity is intended to reduce fraud by confirming the accuracy of self-reported data against thousands of databases that specialize in consumer demographics.
fullcircleresearchco.com

■ Fulcrum, a New Orleans research firm specializing in sampling software, has launched its Exchange Quality Program, a sample source evaluation process of all Fulcrum Exchange suppliers. The process will collect standard demographics, lifestyle and outlook information, shopping and behavioral segments and benchmark questions, allowing measurement to accepted industry norms. All existing and new U.S. suppliers will participate in the Exchange Quality Program in the first quarter of 2015 and the program will be expanded to include international suppliers in the second quarter of 2015.
www.fulcrumexchange.com

■ San Francisco research firm Survata has launched its Consumer Feedback API, which allows any product or service to tap into consumer feedback on-demand by programmatically submitting a survey.
www.survata.com/api

■ New York researcher Nielsen announced plans for enhancing its digital audience measurement reporting for the Interactive Advertising Bureau of Australia. The firm will introduce mobile and tablet audience measurement during the first half of 2015 and will upgrade its current monthly audience reporting to a daily audience measurement, starting in 2016. Nielsen also plans to include big data partners, which will allow Nielsen to increase the scale of people measured from one in 2,000, to one in every two.
www.nielsen.com

■ Facebook has launched Conversion Lift Measurement, a tool allowing marketers to track online sales and offline sales driven by Facebook advertising. It will be available only to advertisers that have a Facebook sales representative and will be limited to larger accounts. Facebook will use a conversion pixel for the online tracking. The offline sales tracking is an extension of Facebook's custom audience users and will require advertisers to upload sales data to Facebook.

■ OfficeReports ApS, based in Copenhagen, has updated its OfficeReports software, making it available within Microsoft Excel. The software now can work with Excel as well as with PowerPoint and Word to read raw data and provide data analysis and surveys. The firm is making a 14-day free trial available at officereports.com/download.
www.officereports.com

■ Levallois, France, research firm Médiamétrie has released a Twitter TV Ratings tool, utilizing a unique audience approach which measures one tweet per account.
www.mediametrie.com

■ Cint has launched Access Pro, a self-service sample supply management tool. It provides automation of pricing feasibility assessment and project delivery either through a firm's own panels, third-party panels or using Cint's OpinionHUB marketplace. The tool is now being tested beta mode on an invitation-only basis.
www.cint.com/solutions/access-pro

■ Research Now, Plano, Texas, has launched a gastrointestinal panel, consisting of people diagnosed with one or more conditions, including Crohn's disease, gastroesophageal reflux disease, anemia, constipation, Hepatitis B, Hepatitis C and irritable bowel syndrome. The panel will look at practices, treatments and attitudes of members. This is the sixth Research Now panel based on a therapeutic area.
www.researchnow.com/en-us/panels.aspx

■ Ameritest, an Albuquerque, N.M., research firm, has established a brand consulting division, based in Chicago and led by Ralph Blessing. The new division will work with clients to better define their brands and bring them to life visually and verbally.
www.ameritest.net

■ M3 Global Research, Fort Washington, Pa., now offers a new service, Medical Conference Recruitment (MCR), which will work with physicians attending any of the medical conferences where M3 will be participating. M3 will utilize the physician feedback to measure the ef-

fectiveness of booths, manufacturer images, conference content and messages of its clients.
research.m3.com

■ Seattle mobile technology firm Marchex has introduced Marchex Call Analytics for Search, a software platform which will allow marketers to evaluate the effectiveness of keywords in producing sales from mobile consumers who call businesses directly from click-to-call smartphone ads. The technology will also identify calls that are most likely to convert to sales and will allow marketers to measure and improve their campaigns in real time.
www.marchex.com

■ London analytics company Bonamy Finch has upgraded its SigTester smartphone app to inform users as to the significance of their quantitative data. SigTester can report if differences between mean scores, proportions or correlation coefficients are statistically significant and can estimate confidence intervals around these types of values. A third function provides the sample size needed to have a specific confidence level.
www.bonamyfinch.com

■ Israeli technology firm Marimedia has released a software tool to analyze mobile use behavior and demographics to improve mobile ad campaign targeting. The software determines the optimal revenue-generating match of publisher ad space with advertiser's inventory. The tool also provides a range of user behavior data combined with demographic data such as location, age, gender and operating system to allow refinement of creative and ad spend.
www.merimedia.com

■ Austin, Texas, research firm Icanmakeitbetter has released two new modules to its suite of feedback tools: Live Chat, which captures immediate feedback; and Digital Journal, which allows clients to create short or long-term journals.
icanmakeitbetter.com

■ Taptica, a San Francisco marketing firm, has launched a mobile ad analytics tool which examines mobile user behavior, including impressions, clicks, conversion, purchases and money spent. It also provides demographics such as location, age and gender.
www.taptica.com

■ In Westport, Conn., research firm Critical Mix has begun a daily omnibus service, kNOW, which can provide feedback from a nationally representative (age, gender and region) sample of 1,000 U.S. adults or 500 mobile-only respondents. The service is available any day of the week, including weekends, with questions submitted by 3 p.m. ET receiving answers by 5 p.m. ET the following day. Clients can receive their data in any format and have instant access through a data visualization tool.
www.criticalmix.com

■ SmartMunk, a software firm in Aachen, Germany, is offering a free demo version of UncodeSense, which analyzes product reviews from online platforms. The content of the texts is analyzed and summarized in an online report and the program can work with almost any language. The free trial can be accessed at uncodesense.com.
www.smartmunk.com

■ Lavastorm Analytics, Boston, has updated its Lavastorm Analytics Engine by adding drag-and-drop capabilities to simplify its application layer. Other new features of the platform include linear regression, logistic regression, k-means clustering, hierarchical clustering and a decision tree.
www.lavastorm.com

■ Cambridge, Mass., software firm Luminoso has launched Compass, which allows businesses to track online discussions in real time and instantly provide damage control if necessary.
www.luminoso.com

■ Logi Analytics, a McLean, Va., software company, is offering an hourly pricing option for its Logi Vision analytics software on Amazon's AWS Marketplace. Users will turn Logi Vision on and off as needed, only paying for what they use. They will still receive product support from the Logi Vision community. The tool includes collaboration features that allow users to access "activity streams" of information and monitor activity within their workgroups.
www.logianalytics.com

■ San Francisco software firm DoubleDutch has launched an analytics platform, Event Performance, which allows event organizers to monitor attendee engagement as the event progresses. The software provides mobile event apps used by attendees that allow organizers to track session traffic and monitor attendee satisfaction.
www.doubledutch.me

■ In San Francisco, Buffer, a social media scheduling firm, has upgraded its analytics tool to allow marketers a quick assessment of the health of their social media campaigns. The tool now includes the ability to sort posts in Twitter, Facebook, LinkedIn and Google+ pages by popularity.
https://bufferapp.com

■ Minneapolis researcher Information Services Group (ISG) has established a dedicated cloud solutions division to assist clients as they transfer their work to the cloud. The new division will allow ISG to expand its cloud services with evaluation tools and management platforms, including evaluation metrics, scoring system and decision-support methodology.
www.isg-one.com

■ Scanadu, a designer of medical devices based at Moffett Field, Calif., is testing Scanaflo, an iPhone-ready urinalysis strip that can detect pregnancy, diabetes or the use of some drugs. The device measures up to 12 reagents which show up as various colors on the stick. The app then detects and analyzes the colors to determine its findings. Although not FDA-approved for diagnoses, the device could have market research uses in screening subjects for health-related studies.
www.scanadu.com

TURF, Shapley value and approximations

| By Albert Madansky

snapshot

A look at some shortcuts when using TURF and Shapely value.

quirks.com/articles/2015/20150405

The choice of products to be marketed from among a larger set of possible products is one that marketers face regularly. To help select those products to be marketed, two computations algorithms have been set forth, TURF (total unduplicated reach and frequency; see, for example, Cohen, 1993) and Shapley value (see, for example, Conklin and Lipovetsky, 1999, 2005). This article compares the two algorithms and suggests some shortcuts which are less computationally onerous and will produce roughly equivalent results.

TURF and Shapley value

Suppose we have n products and wish to select m of them such that the reach of the m products is maximum. There are t = n!/m!(n-m)! possible selections of m products out of n. What TURF does is look at all t combinations of m products and selects the one combination that maximizes the reach. To get a sense of the magnitude of t, we note that when n=17 and m=6 then t=12,376. But our firm has had requests for TURF analyses for situations as large as n=80, m=11, which meant searching for a maximum among 10,477,677,064,400 combinations.

The application of the Shapley value to this kind of data takes a different approach. It starts with the reach of the combination of all n products. It then proceeds to allocate that reach across each of the products in a manner that reflects the relative contribution of each product to the total reach. Advocates of the use of the Shapley value in selecting m out of n products would select the m products with the highest Shapley values.

In order to calculate the Shapley value one must look at the reaches of all combinations of products, from m=1 to m=n. This involves the computation of 2^n reaches. When n=80, then, regardless of the number m of products to be selected, one would have to calculate the reaches of 1,208,925,819,614,630,000,000,000 combinations of products. And when n=17, one would have to calculate the reaches of all 131,072 combinations, as compared with the 12,376 combinations required for the use of TURF when m=6.

To illustrate the difference in the selections of the two approaches, I use a slightly modified data set from that used in an example by Conklin and Lipovetsky, 2005. In my data set there are 278 respondents with n=5 products, which we will dub A, B, C, D and E. The reach of all five products (r(ABCDE)) is 132 (or 47.5 percent). The individual reaches are: r(A)=78, r(B)=70, r(C)=73, r(D)=80, and r(E)=72. Thus the order of the products based on individual reaches, from high to low, is

D > A > C > E > B.

Table 1 presents the reaches of all pairs, triples and quadruples of products.

Let m=2. Then, based on this table, the pair with the highest reach is AE, where r(AE)=125, which is what TURF would have selected.

The Shapley values of the five products, along with the Shapley value percentage of r(ABCDE) for each product, are the shown in Table 2.

Thus the order of the products based on the Shapley values, from high to low, is

E >B >A >D >C.

large.

Fieldwork has MORE focus group facilities in the U.S. than anyone else. After 30 years in the business, we are HEAVY on experience. With an owner/operator at every facility (16 in all) we have a MASSIVE commitment to on-site quality. And, five more owners at the corporate level, add GREAT WEIGHT to a cohesive brand. Over the years, we have constantly monitored and enhanced our local databases, making them VAST without the extra fat. Compared to any other facility chain, you have to admit, we've got GIRTH.

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SAN FRANCISCO • SEATTLE-KIRKLAND • SEATTLE-DOWNTOWN • GLOBAL PROJECT MANAGEMENT

Table 1

AB	108	ABC	113	ABCD	126
AC	100	ABD	126	ABCE	132
AD	106	ABE	132	ACDE	125
AE	125	ACD	119	ABDE	132
BC	105	ACE	125	BCDE	132
BD	114	ADE	125		
BE	108	BCD	119		
CD	98	BCE	132		
CE	111	BDE	132		
DE	111	CDE	111		

Then, based on this, the pair with the highest Shapley values would be EB, with a reach of 108. This is because E and B provide, using the Shapley criterion, the most to the

Table 2

A	26.0	19.7%
B	28.3	21.5%
C	22.6	17.1%
D	24.7	18.7%
E	30.4	23.0%
Total	132.0	100.0%

combined reach of all the five products. This, however, may not be an appropriate criterion for the marketer.

We can ratchet this argument backward to look at the case $m=1$. Then TURF (and common sense) says that the product to select if one had to select only one product is D, with a reach of 80, and not E, the product with the highest Shapley value, with a reach of 72. Yes, based on the Shapley criterion, Product E contributes most to the total reach of ALL five products. But, as Damon Runyon once said, "The race is not always to the swift, nor the battle to the strong, but that's the way to bet." If one has to go with one product, one should go with the one with the highest reach.

Stepwise TURF and main-component Shapley value

Given the enormity of the number of combinations one must assess in using TURF or Shapley value in determining product mixes, our firm has devised variants – stepwise TURF and main-component Shapley value – which greatly decrease the number of computations required to use these methods and generally produce the same results.

Stepwise TURF is patterned after the logic underlying stepwise regression. Stepwise TURF selects as its first product the one with the largest reach, say P_1. Given that selection, it then looks at the $n-1$ remaining products and finds that product which, coupled with P_1, produces a pair of products with highest reach, say P_2. At the next step it looks at the $n-2$ remaining products and finds that product which, coupled with P_1 and P_2, produces a triple of products with highest reach, say P_3. This process is followed until m products have been selected, at which point the m products are $P_1, P_2, \ldots, P_m$. The number of reach combinations calculated in stepwise TURF is then $n + (n-1) + (n-2) + \ldots (n-m) = [n(n+1)-m(m+1)]/2$. So even in the $n=80$, $m=11$ example cited earlier the number of reach combinations is 3,174, much smaller than the 10,477,677,064,400 combinations required by TURF.

To illustrate this process on the above data, stepwise TURF would first select Product D. It would next select Product B, because the reach of DB is greater than the reach of any other product coupled with D. This stepwise TURF would not find the optimum pair, because r(DB) is 114 whereas the optimal pair is AE, with a reach of 125.

As is the case in stepwise regression, stepwise TURF does not always lead to the absolute best set of m products. But, both because of its computational ease and because it follows the "Damon Runyon dictum" for $m=1$, it is a recommended approach when one

Table 3		
m	gamma	percent
1	0.058824	46.6%
2	0.003676	2.9%
3	0.000490	0.4%
4	0.000105	0.1%
5	0.000032	0.0%
6	0.000013	0.0%
7	0.000007	0.0%
8	0.000005	0.0%
9	0.000005	0.0%
10	0.000005	0.0%
11	0.000007	0.0%
12	0.000013	0.0%
13	0.000032	0.0%
14	0.000105	0.1%
15	0.000490	0.4%
16	0.003676	2.9%
17	0.058824	46.6%
TOTAL	0.126312	100.0%

has large TURF computations.

Main-component Shapley value

The formula for Shapley value (equation 3 of Conklin and Lipovetsky, 2005) is

$$S_k = \sum_{allM} \gamma_n(M)[v(M \cup \{k\}) - v(M)]$$

where

$$\gamma_n(M) = \frac{m!(n-m-1)!}{n!}$$

so that $\gamma=1/n$ when m=0 and when m=n-1, $\gamma=1/n(n-1)$ when m=1 and m=n-1, and with each increase in m γ is of the order of 1/n times the predecessor value of γ. Thus the greatest weights in the computation of S_k are for the first and last terms of the equation, those related to the single reach of each product and the contribution of that product to the reach of all n products. I illustrate this with an example (Table 3) for n=17.

Note that the computations for m=1 and m=17 together get 93.2 percent of the weight in the computation of the Shapley value. So a main-component Shapley value computation would be based only on the first and last terms in the sum, both simple computations.

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••• business-to-business research

A layered approach

Why B2B market research is different – and what to do about it

| By Mark Towery

snapshot

Mark Towery offers his keys to successful B2B/industrial research and outlines some of the skills needed to get the information you and your clients need.

quirks.com/articles/2015/20150406

There is an emerging school of thought purporting that the lines between B2B and B2C marketing are being blurred blissfully into a world without such antiquated barriers; a world known to futurists as H2H ("human-to-human"). As digital technology allows advanced personalized marketing to individuals and creates influence parity of celebrities and average citizens, the argument is seductive.

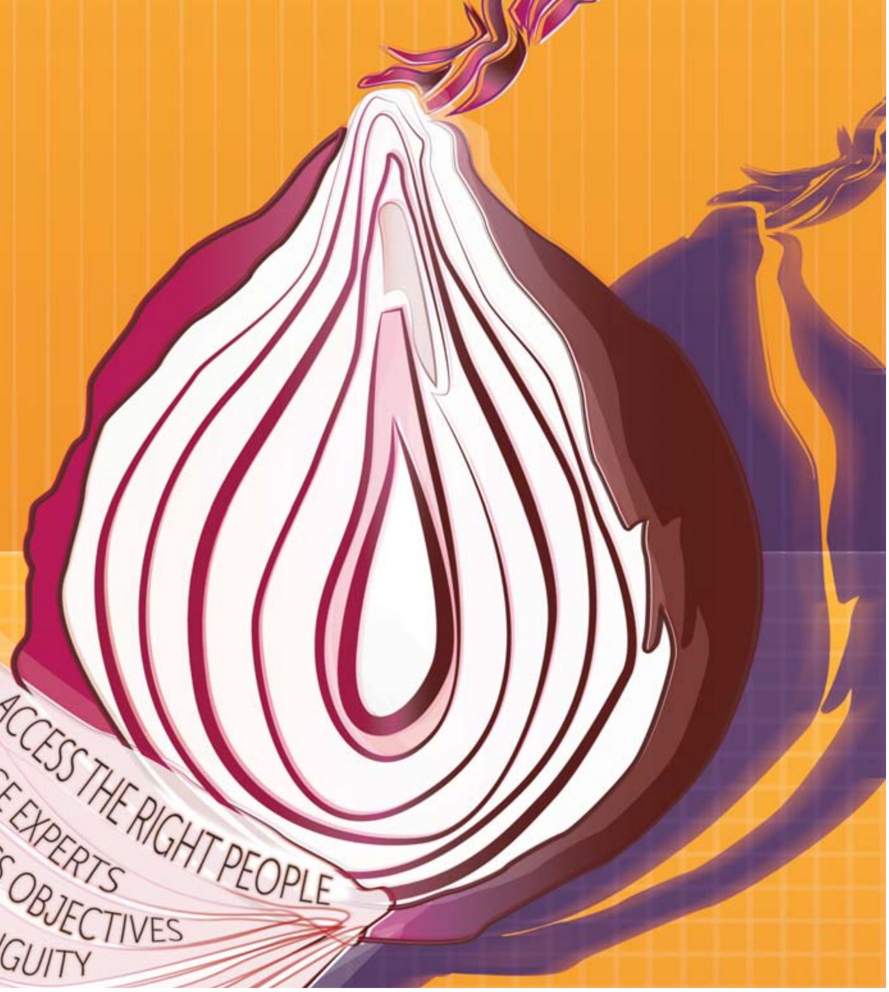
I, however, beg to differ.

It is my suspicion that this pseudo-proclamation of sameness of corporations and consumers is being promoted by B2C agencies as a way to compensate for lack of B2B street cred as they attempt to tap into digital opportunities in the business-to-business arena.

Speaking directly from the trenches of industrial market research, I suggest that the differences between B2C and B2B are as stark as the differences in a ballroom and a bayou. B2B market researchers, at least, must have a basic understanding of the business context and incorporate company- and industry-specific distinctions into their approach and process.

B2C market research often involves collecting and analyzing large amounts of data about customers' attitudes and behaviors as they relate to relatively straightforward products. B2C may require sophisticated research or data analytics techniques but does not necessarily need to address the business context. You need to know your data and it helps to be a bit of psychologist.

B2B, and particularly its industrial segments, requires an entirely different approach to market research because of the importance of both performing and interpreting research in the business context. Sophisticated research techniques, while valuable, are less important than understanding technical product applications or complex business models. As a B2B market research professional you need to get the data right but you need also to be a strategist and approach each



research project as a business case analysis.

To spell it out, the essence of B2B and industrial market research is the requirement to ...

... access a limited number
... of very busy and important experts in their field
... who often reside off the grid
... and may be located anywhere in the world
... with no reason to want to talk to you
... whom you must convince to talk with you
... and divulge semi-confidential details about their organization's activities
... from which you must be able to ascertain and explain complex decision-making
... involving multiple individuals and departments if not organizations
... and you must have sufficient knowledge of their business environment to be able to moderate that technical or complex conversation
... and ultimately interpret what they told you in the right strategic framework and business context.

What are the keys to successful B2B/industrial market research? Well, I can think of at least five.

1. Accessing the right people (it's NOT who you know)

The more industrial the project's focus, the less likely you are to find a panel or even a directory of qualified targets. The experts possessing the knowledge and insights you seek must be found through creative and arduous investigation. And there may be only a few of them worldwide, so you have only a few opportunities to connect. If and when you do connect, you have to convince each to share his/her time. No amount of pre-existing relationships will aid this process; it takes old-fashioned gumption, creativity and tenacity.

I bristle when clients ask if we have a panel or pre-existing relationships in an industry. We may have completed a dozen projects in a single industry segment and have hundreds of warm contacts but still not be able to use the same respondents for Project Number 13. Every project is a custom business case. The key is knowing how to identify decision-makers and access them with or without prior relationships.

The right respondent could be a tier-two automotive engineer who is the final authority on the mold block material used for injection-molded parts; or a maintenance supervisor who selects control valves for his pulp and paper plant; or an electrical contractor who works exclusively in oil and gas refineries. Accessing the right people is not about who you know; the key is in-depth knowledge of innumerable industries and knowledge of which trigger will induce a qualified respondent to participate in the process of market exploration.

Consider the following scenario: you want to tap into the voice of the oil rig worker regarding personal protection equipment. Guess what? An oil rig worker is either on a rig, in a deer stand or in a bass boat. They don't have an office; their cell phone is not listed; they are off the grid. No focus group facility can recruit them for you. No list company can save you. So, you find an oil rig job recruiter and place an ad. You learn from a drilling contractor about training courses being held in a hotel in Lafayette, La. You catch a flight and walk the halls of the conference center asking roughnecks and roustabouts to join you in a room for $200 and free beer. Soon you have a focus group.

The next day you drive down I-10 looking for oil derricks. After a few miscues pulling up to cell phone towers, you find an onshore rig in a cow pasture. You show up with food and interview oil workers in their trailer as they eat étouffée. The next day, you fly to Aberdeen, Scotland, and intercept offshore rig workers at heliports when they come in from offshore rigs in the North Sea. Piece of cake – or, maybe, bite of crawfish.

2. Engaging experts in a meaningful conversation (money can't buy you love)

Congratulations when you are able to find a hard-to-reach decision maker. Now you have to get them to talk to you. Perhaps surprisingly, we do not offer incentives in the majority of our B2B studies. In most cases, you simply cannot compensate a busy professional or expert for the time they are sharing with you. So, you have to trade on their goodwill and perhaps their belief in the karma of casting their grains of insights on the sandy beaches of industry knowledge to improve the products and services available to them in the future. But mostly, you have to connect with them and that means understanding their job, their company and their industry. Almost everyone is proud of what they do and happy to share their knowledge with someone who can understand it and appears empathetic.

Doing your homework not only aids recruitment, it allows you to hold an intelligent conversation with them about thermocompressors, or bioremediation, or control valves, or paper machines, or insurance services, or mold block material, or data-as-a-service, or welding helmets, or pressure vessels, or magnesium sand castings or flight navigation. There is no substitute for being knowledgeable about the topic du jour. Knowledge supports the innate ability to think on your feet and the acquired skill to probe appropriately and tease out unmet needs that may not be voiced when respondents interact with less-experienced interviewers.

To be clear, moderating a discussion about a complex business model or a technical or industrial application does not mean you have to be an expert in the subject matter. In fact, being an expert is usually a liability because you cannot view insights objectively. But it does mean your expertise cannot be limited to research methodologies. For better or worse, the only way to have amassed the vast breadth of knowledge necessary to conduct effective B2B/industrial research is to have several years of experience and accumulated wisdom; then do your project-specific homework. The obvious implication of this reality is that B2B researchers are generally senior consultants. As a result, they do not come cheap. You can't slay an elephant with a popgun; it requires larger-caliber artillery.

3. Research and strategy are not separable (it's all about the business objective)

Hand-in-hand with the ability to moderate a complex or technical interview is the ability to see how the little pieces form the big picture. Customer insights without competitive intelligence and industry analysis will only take you so far. The B2B/industrial market researcher must be able to analyze the entire competitive landscape and complete complex business case analyses. Market sizing, market attractiveness, channel strategies, strategic positioning and a go-to-market strategy that addresses the reality of competitive dynamics must all be part of the equation. If you are not a business strategist, you are probably not a real B2B market researcher.

In the world of B2B, clients may seek tactical insights but are more likely to seek a strategy to position their company for growth. Research for the sake of research has zero utility. It is ultimately all about the business outcome.

A market-sizing exercise illustrates the difficulty and complexity of getting B2B right. Market sizing is not a matter of counting widgets; it is about building a model that is populated by primary insights, secondary data and sound business judgment. Typically, market sizing requires both a top-down and a bottom-up approach – an examination of both supply and demand. From the top, we look at market trends and competitor output and conduct macro analysis. From the bottom, we (for example) may research the number of products per specific application, the number of applications per plant, the number of like-plants for a given industry and geography. The researcher may need to factor in new plant construction and expansion as well as MRO and retrofits. You must also conduct sensitivity tests of regulatory and environmental factors.

The B2B market researcher needs to understand more than how to determine derived importance, calculate a Net Promoter Score and elicit both articulated and unarticulated needs. The B2B market researcher must understand their client's business model, the competitive forces of the industry, effective value chain strategies and be able to recommend the best overall strategic positioning of the company. Sometimes this means delivering a well-documented analysis indicating that the opportunity does not justify the investment required, or that it is time to sell the company. In short, you must conduct detailed and specific business case analysis and scenario modeling. In other words, you must go slightly beyond "Coke or Pepsi."

4. Embracing ambiguity (learn to love the response "It depends")

B2B market insights rarely come as singular conclusive findings. Most large-dollar B2B purchases are complex, with many factors to be considered by many different decision-makers. The relative influence of different decision-makers often varies from company to company. The rationale for decisions most offered by respondents is "It depends." The B2B market researcher must navigate this complexity and ambiguity and, by understanding the business context and analyzing the same factor multiple ways, come to a conclusive recommendation.

This challenge is not for all. The more industrial the focus, the more one could erroneously believe it takes an engineer to conduct industrial market research. Nothing could be further from the truth. Consider the following scenario.

It is early morning and a hot-air balloon hovers over the 16th hole of a suburban golf course. The sky is clear, cirrus clouds paint brush strokes on a brilliantly blue sky and frosty dew glazes the manicured green.

A golfer in purple double knit stares up as a man leans over from the basket and asks, "Can you tell me where I am?"

The golfer replies, "You are at latitude 33.7550 degrees north and longitude 84.3900 degrees west in a hot-air balloon, hovering approximately 28 feet above the ground."

The man in the balloon replies, "You must be an engineer, because everything you said is factually accurate and totally useless."

"And you must be a marketer," the golfer says, "because you set out without a plan, you don't know where you are, you have no idea where you are going or how to get there and suddenly it's my fault."

Engineers are literal and binary and do not function well in a state of ambiguity. The B2B path to purchase is often a very winding and muddy road. Real B2B market researchers must thrive in such ambiguity. They must also be excellent at synthesizing vast amounts of complex data, analyzing it and then communicating the essence of it in clear, simple terms. We have found from experimenting with interns that pre-med students and English majors perform surprisingly well at B2B research because of these very skills. Analytically-minded former business executives also seem to fit. Whatever the background, you must be able to think in parallel patterns, synthesize volumes of information, combine intuition and analysis and question absolutely everything until nothing is left standing but the obvious path forward.

5. Be nimble and flexible (expect failure and plan for recovery)

Be wary of the B2B researcher with a singular methodology. Forget about routine and repeatable studies. Every B2B/industrial market research project is an exploratory voyage of discovery as epic as the building of the pyramids or the race to the moon; and requiring, by the way, the same amount of heavy lifting.

B2B market research projects demand that you leverage a flexible tool kit of methodologies and may require you to invent one along the way. In fact, a global B2B/industrial market research project has many moving technical pieces and may require you to push your capabilities beyond your current technologies. To be effective, you must first embrace the idea that there is no road map. You have to find your way over, under or through obstacles and your most carefully chosen work plan may require revision.

The moon shot occurred with 64K of computer memory; the pyramids were built without compasses. Yet the lunar landing was a showcase of mathematical precision and the pyramids are in perfect alignment with true north. The key is to focus on the business objective and tailor the methodologies to the task at hand. Always remember: You never know where you will end up when you embark on the journey. Columbus was looking for Indonesia and only missed it by a hemisphere but in doing so he discovered an entire new world. Seek opportunities, not completed surveys.

6. Bonus: The ultimate key to B2B market research success (the right people with the right stuff)

If it is not yet apparent, I will spell it out: The secret to being successful in B2B and industrial market research is to employ the right people. Hire or engage consultants who are both strategists and researchers. If they have tangible business experience in an operating environment, it's even better. Look for people with insatiable curiosity who constantly absorb knowledge from a wide range of sources.

If a consultant tells you she dreamed about a way to monetize a non-woven fabric application in operating rooms, you've found your candidate. If you catch them sneaking off to read *Scientific American*, *The Economist* or *Engineering News-Record*, they may go the distance.

Finally (and this is the secret ingredient), hire the most stubborn and cynical personalities you can find. At our firm, we administer personality profile tests to all new consultant candidates and we believe we have isolated "the chromosome." The candidates that excel at projects performed at the intersection of hard and harder are off-the-scale cynical. If you ask them to accomplish A, B and C they will ask if this is from the Greek or Roman alphabet and ask whether the letter should be capitalized. They will question your hypotheses and perhaps suggest 1, 2 and 3 instead. They are not box-checkers. They don't think inside or outside boxes – they don't use boxes at all. In the world of research, possession of the cynical trait indicates to us that they will question everything, challenge all assumptions and not rest until the competitive landscape is laid bare and the path forward is obvious to all. At the end of the day, that is the mission of the B2B researcher: Make the competitive environment transparent so good strategic decisions can be made.

For the record, this advice comes to you from one human to another.

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••• business-to-business research

There must be a better way

Why the Kano model wears no clothes

| By Terry Grapentine

snapshot

Terry Grapentine outlines the problems with the Kano model, from scale disagreements to problematic response patterns, and explores why Kano is so controversial.

In 1984, Kano, et al. (hereafter referred to as "Kano") published a model purporting to help management design products that better satisfy customers.[1] The model involves having consumers evaluate a battery of product attributes – called quality elements – on two different questions. Based on their answers, the model classifies the quality elements into different evaluation categories – and it is these categories that purportedly provide product design guidance to managers.

Figure 1 is Kano's framework as it appears in the 1984 paper. Quality elements fall along two dimensions. The vertical dimension ranges from (top) a more "satisfied feeling" to (bottom) "dissatisfaction." The horizontal dimension ranges from (left) "non-fulfillment" to (right) "state of physical fulfillment." "Fulfillment" is described in the literature as "attribute performance,"[2] ranging from (left) worse to (right) better; or "objec-

Figure 1: Representation of the Kano Model as Depicted in Kano et al.'s Original 1984 Article

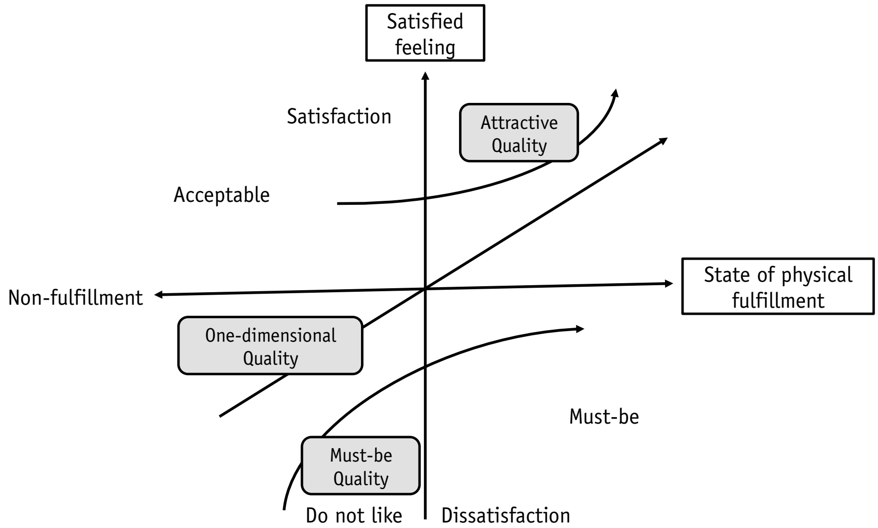

Table 1a: Definitions of Quality Elements from the 1984 Kano Article

Name	Definition (quoted verbatim from 1984 article)	Example
Attractive Quality Elements	Quality elements that when fulfilled provide satisfaction but when not fulfilled are acceptable	A motel leaving mints on one's pillows might be considered an Attractive Quality Element for many consumers
One-Dimensional Quality Element	Quality elements that result in satisfaction when fulfilled and in dissatisfaction when not fulfilled	Higher vs. lower miles per gallon in a vehicle
Must-be Quality Elements	Quality elements that are absolutely expected (taken for granted when fulfilled) but result in dissatisfaction when not fulfilled	The battery life indicator on a cell phone

Table 1b: Definitions of Quality Elements from the 1984 Kano Article

Name	Definition (quoted verbatim from 1984 article)	Example
Indifferent Quality Elements	Quality elements that neither result in satisfaction nor dissatisfaction, regardless of whether they are fulfilled or not	Soft, background music in a motel lobby[4]
Reverse Quality Elements	Quality elements that result in dissatisfaction when fulfilled and satisfaction when not fulfilled	Some consumers like high-tech product features on their cell phone and others (e.g., flip-phone users) find them a nuisance

tive quality,"[1] which is the "amount of the quality element"[3] that is present in the product, e.g., no cupholders (quality element not present) to many cupholders (quality element present to some degree). Based on these ratings, Kano groups these elements into three categories as defined in Table 1a and shown in Figure 1. (Kano discusses two additional categories, "indifferent" and "reverse quality elements" [Table 1b], which were not depicted in Figure 1.)

Respondents rate quality elements on two questions (see Figure 2). The literature refers to the first question as the functional question – the quality element is present. The second question is the dysfunctional question – the quality element is not present or present to a lesser degree than in the functional form.

Interpreting the Kano model

Figure 3 shows how these quality element ratings are classified into Kano's six evaluation categories. Kano emphasizes the first three (examples drawn from Amy M. Gregory's dissertation[2]):

- **Optimize product performance.** Seek to provide the highest performance as technology and the market allow for one-dimensional quality elements. For example, for the functional question, most people would rate relatively high gas mileage, "like." In the dysfunctional question, most people would rate relatively low gas mileage, "do not like," which places this quality element in the one-dimensional category.
- **Product differentiation.** Endeavor to distinguish your product on the "attractive" dimension. For example, for the functional question, most people would rate getting extra blankets/pillows in a hotel room, "like." For the dysfunctional question, most would rate the absence of these extra items, "acceptable," which places this quality element into the "attractive" category.
- **Meet consumers' basic needs.** Insure the product delivers quality elements in the "must-be" category. For example, for the functional question, most people would rate the presence of a color TV in a hotel room "must-be." For the dysfunctional question, most people would rate the absence of a color TV in a hotel room "do not like." Kano translates these ratings as falling into the "must-be" category.

Kano model problems

Kano scale disagreement. Table 2 shows that many authors have changed the wording of the Kano scale. So, do different scale definitions give the same results? MacDonald et al.,[5] (hereafter referred to as "MacDonald") say no. In testing several ways of presenting and labeling the scale points, the authors state that "We found that survey scale [definition] does make a difference in how respondents answer the survey [and the number of times a respondent uses a particular scale point in its functional and dysfunctional format] ... varies significantly across the four versions of multiple-choice answer frameworks [tested in our study]." For example, when comparing MacDonald's definition of the Kano scale points to simply anchoring the

Figure 2: Example of the Functional and Dysfunctional Forms of the Kano Quality Element Rating
(as represented in the Kano et al. 1984 article)

Functional question	How would you feel if the TV picture was good? (for example, no ghost image or shadow)	❍ 1. Like ❍ 2. Acceptable ❍ 3. No feeling ❍ 4. Must-be ❍ 5. Do not like ❍ 6. Other
Dysfunctional question	How would you feel if the TV picture was poor? (for example, ghost image or shadow)	❍ 1. Like ❍ 2. Acceptable ❍ 3. No feeling ❍ 4. Must-be ❍ 5. Do not like ❍ 6. Other

Figure 3: Kano et al.'s Quality Element Categories
(as represented in the Kano et al. 1984 article)

		Answer to the Dysfunctional Question					
		Like	Acceptable	No Feeling	Must-be	Do not like	Other
Answer to the Functional Question	Like	S	A	A	A	O	
	Acceptable	R	I	I	I	M	
	No Feeling	R	I	I	I	M	
	Must-be	R	I	I	I	M	
	Do not like	R	R	R	R	S	
	Other	"Other" responses are ignored					

Legend:
O: One-dimensional Evaluation
A: Attractive Evaluation
M: Must-be Evaluation
I: Indifferent Evaluation
R: Reverse Evaluation
S: Skeptical (considered to reflect a mistake)

scale endpoints from "like" to "dislike," they found that the frequency with which respondents used the midpoint of the scale differed between the two approaches.

Kano classification vs. self-classification. MacDonald gave respondents definitions of the Kano quality element categories and then had respondents classify the quality elements directly into the Kano categories (e.g., one-dimensional evaluation, attractive evaluation, and so on). They concluded that "... the Kano method does not classify attributes as individuals would classify them in direct categorization."

Although MacDonald claims to offer methods to overcome these shortcomings, my review of the literature suggests that there is no generally accepted approach as to the most valid way to define the Kano scale. Shahin, et al. corroborate my belief in their 2013 review of the Kano literature when they say that "It is apparent from the literature that there is no unique type of Kano model and Kano evaluation table."

Problematic response patterns. Conceptual definition vagueness and ambiguity within the functional and dysfunctional form questions can cause the Kano model to produce illogical respondent response patterns and Kano recognized this to a degree. For example, Kano identifies three awkward answer patterns to the Kano scale (see Figure 3) labeled either "S" (skeptical) or "other." This occurs when respondents answer "like" to both the functional and dysfunctional questions (category S); answer "do not like" to both formats (also category S); or, if the "other" option is provided, respondents select that response for either or both question formats.

Additionally, it's difficult to reconcile Kano's quality element classifications (Kano's terminology) in Table 1a and 1b and the quality element evaluation categories (Kano's terminology) in Figure 3. For example, Kano says that "must-be" elements "are absolutely expected ..." and when absent, "result in dissatisfaction" (Table 1a). But he also labels as being in the "must-be" evaluation category (Figure 3) a situation in which a respondent selects "no feeling" if a quality ele-

Table 2: Examples of Alternative Kano Scales Used for Functional and Dysfunctional Attributes

Kano et al. Original Paper (1984) [1]	Shahin, Arsh et al. (2013)	MacDonald, Erin et al. (2006)	Wu, Hsin-Hung et al. (2010)	Latta, Michael (2013)	Lieberman, Michael (2008)
Like	I like this feature	I like it that way	Delight	I would be delighted to find it that way	Much better than expected
Acceptable	I need this feature	It must be that way	Expect it and like it	I expect it that way	Better than expected
No feeling	I am neutral about this feature	I am neutral	No feeling	I am neutral	As expected
Must-be	I can live with this feature	I can live with it that way	Live with it	I would not like it that way but I can live with it that way	Worse than expected
Do not like	I dislike this feature	I dislike it that way	Do not like it	It must not be that way	Much worse than expected
Other	This response is not offered	Instruction to respondent: Leave answer blank	This response is not offered	This response is not offered	This response is not offered

Table 3: The Logical Fallacy of Affirming the Consequent and the Kano Model

Premise 1: If P, then Q	If the theory underlying the Kano model is correct (P), then the model will produce face valid results (Q)
Premise 2: Q is true	The Kano model produces face valid results (Q is true)
Conclusion: Therefore, P is true	Therefore, the theory underlying the Kano model is correct

ment is present (the functional question) and then selects "do not like" if the quality element is not present (the dysfunctional question). That pair of answers is nonsensical – if you truly have no feeling for if a quality element is present, why would you respond "do not like" if the quality element is not present?

The problem in this example reveals incoherence between Kano's quality element classifications and the quality element evaluation categories in the 1984 paper. To further illustrate, consider another example focusing on the "attractive quality elements," which Kano defines (Table 1a) as "Quality elements that when fulfilled provide satisfaction but when not fulfilled are acceptable." Respondents, however, do not rate the quality elements on varying degrees of satisfaction and varying degrees of acceptance. Rather, in the 1984 article, these elements are rated as being different kinds of "feelings" denoted by the terms "like," "acceptable," "no feeling," "must-be," "do not like" and "other."

Consider the problems this causes. Take the attribute "TV picture forms quickly" (a functional attribute from the 1984 article).[6] Kano implies that if a respondent selects "like" for this attribute, the attribute causes satisfaction. For the dysfunction question, "TV picture forms slowly," if the same respondent selects the feeling "acceptable," Kano classifies this attribute (Figure 3) as being in the attractive evaluation category, which is logical given his framework. But Kano also classifies in the attractive evaluation category a respondent who selects "like" for "TV picture forms quickly" and then selects "must-be" for "TV picture forms slowly," which makes no sense because this pair of answers is absurd.

Sensitivity of Kano results to attribute wording. Clearly, changing attribute wording can change survey results. If you review the Kano model literature, however, there seems to be an implicit assumption that "consumers' evaluations of a given attribute in terms of provision/non-provision are the same (or at least similar) to consumers' evaluations of the same attribute in terms of high/low attribute-performance," say Josip Mikulic and Darko Prebežac in a recent *Managing Service Quality* article.[7] They tested this hypothesis with two different ways of wording Kano's functional/dysfunctional quality elements. The first set refers to whether an attribute is present or not:

Q1a functional: "When opening a new bank account, how would you feel if you were provided with a mobile banking service?"

Q2a dysfunctional: "When opening a new bank account, how would you feel if you were not provided with a mobile banking service?"

The alternative wording focuses on level of bank performance (high/low):

Q1b functional: "When opening a new bank account, how would you feel if you were provided with a mobile banking service that works very well?"

Q2b dysfunctional: "When opening a new bank account, how would you feel if you were provided with a mobile banking service that works very poorly?"

When the present/not present wording was used, respondents placed the mobile banking service in the "attractive" evaluation category 59 percent of the time. When the high/low performance wording was used, this figure dropped to 22 percent. As the authors conclude, "It is apparent from this illustrative example that the classification of the attribute varied significantly – depending on how [the attribute] was defined and operationalized." (page 50)

Psychometric validity of the Kano scale. A minimum requirement for a valid measurement scale is that it is one-dimensional. As discussed by Jum Nunnally in his book, *Psychometric Theory*, measurement "consists of rules for assigning symbols [often these symbols are numbers, such as in a seven-point rating scale] to objects [attributes or quality elements] so as to (1) represent quantities of attributes numerically (scaling) or (2) define whether the objects fall in the same or different categories with respect to a given attribute (classification)."[8] In other words, individual scales are supposed measure just one thing. For example, marketing research textbooks warn against using "double-barreled" attributes such as rating a bank on having "friendly and fast teller service."

Taking a look at Table 2, for purposes of explanation, I refer to the Kano scale used by MacDonald because this way of wording the scale is one that many authors use today (for reasons, by the way, that are not particularly clear).

Consider the responses "I can live with it that way" and "I dislike it that way." Living with and like/dislike are two different concepts. How does a respondent, therefore, answer the functional form question if he both dislikes it but can live with it? Additionally, how does a respondent rate a quality element if he is both neutral toward it but can "live with it"? Does he select the scale point "I am neutral" or the scale point "I can live with it that way"? Similar confusion can be caused between the scale points "I like it that way" and "It must be that way."

Kano model controversy

Why is the Kano model so controversial?

The Kano model did not originate in marketing. Kano's paper was published in the *Journal of the Japanese Society for Quality Control*. In citing the literature upon which their article is based, the authors reference books and articles in the field of philosophy twice and quality control and analysis 30 times – with no references to the marketing literature.

Kano's review of the literature, for example, did not reference Paul E. Green and Yoram Wind's 1975 *Harvard Business Review* article, "New way to measure consumers' judgments," which introduced conjoint analysis to the marketing industry and which appeared nine years before Kano's publication! Green and Wind's method can estimate the non-linear relationships in Figure 1 but Kano's can't!

Omission of psychometric measurement considerations. Psychometrics is the study of measurement validity and reliability. Green and Wind anchored their conjoint analysis methodology in the field of psychometric measurement. They stated:

"... in recent years researchers have developed a new measurement technique from the fields of mathematical psychology and psychometrics that can aid the marketing manager in sorting out the relative importance of a product's multidimensional attributes."

Although you will find articles that test various ways of wording the Kano scale, my literature search did not uncover any articles specifically examining the psychometric properties of the Kano scale.

Kano results and face validity. Ironically, the Kano model often produces results that are reasonable, if not face-valid. There are several reasons for this: 1) because of time and cost constraints, only quality elements deemed "important" by management make it onto surveys; 2) consequently, respondents rate most attributes "like" or "acceptable" on the functional question and "do not like" on the dysfunctional question, resulting in the model classifying many elements in the one-dimension or must-be evaluation categories. For example, Kano's 1984 paper gives quality element classifications for 19 attributes across two studies, of which 15, or 79 percent, are classified in the one-dimension or must-be categories.

But reasonableness and face-validity are poor arguments to make in supporting a methodology and here's why.

First, findings derived from a poor methodology are sometimes similar to a more accurate methodology's findings. If you assume that the sun revolves around the Earth, you can construct a highly mathematical model that predicts the seasons and planet locations in our solar system with a relatively high degree of precision. But the Earth-centric model is wrong.

Second, if a model's predictions appear valid, to think that the theory underlying the model is necessarily valid is to create a logical fallacy. This fallacy is called affirming the consequent and is illustrated in Table 3. The conclusion, "Therefore, P is true," does not follow from the premises. There can be other factors that make Q true other than P. In the Kano case, the Kano scale can often differentiate quality elements that don't affect satisfaction vs. those that do – although this discrimination is like looking through a microscope with a 10x power lens versus using a conjoint "microscope" with a 200x power lens.

Third, methodologies must pass theoretical scrutiny first before one can justify using them in a practical setting. Although it is true that all marketing research methods have theoretical shortcomings, one should attempt to minimize these problems whenever possible.

Consequently, a) the multidimensionality of the Kano scale; b) the vagueness of the Kano model's terminology; c) the potential respondent confusion when interpreting scale points (beyond what might expect with a typical Likert-type scale); and d) the illogical combinations of selected functional and dysfunctional answers to Kano scale questions bring into serious question this model's veracity.

Recommendations

The preceding discussion makes a strong argument, grounded in the literature, for not using the Kano model. Therefore, I recommend using conjoint-type methods to examine product design questions similar those addressed by Kano.

There are, however, many times when budgets don't allow clients to field a conjoint study. What do you do in those situations? Here are some suggestions:

Qualitative research: Rely more on qualitative research to understand the nature of the consumer decision and product evaluation processes and use this knowledge to shed light on product design questions; conduct in-depth one-on-one interviews instead of focus groups to gain this insight; give respondents conjoint stimuli, have them identify the products they would most likely purchase and then question them about their decision processes (e.g., how do they trade-off different conjoint treatment attribute levels, etc.).

Quantitative research: Conduct monadic tests of different product profiles in which only one attribute is changed from one monadic sampling cell to another; examine how changing one attribute at a time affects consumer brand preferences and attitudes.

Realize that if you don't use a conjoint-type approach to investigate product design questions involving product-feature trade-offs, you have to fall back on the use of direct questioning methods – e.g., "What's the likelihood you'd purchase X, if Y were changed in the following way ...?" In these cases, professional marketers and marketing academics generally agree that these direct-questioning approaches are inferior to indirect conjoint-type methods.[9]

Regardless of which method you use, all research methods have shortcomings. In part this is because marketing research is an imperfect social science. We cannot include all the factors in our models that influence consumers to purchase products and brands. Many of these factors play dual roles of being both effects and causes (e.g., perceived product quality is a potential cause of brand choice but perceived quality is also, in part, an effect of a product's price). Our models cannot measure all of these interconnected and contingent relationships and our measures of many of these factors are imprecise. Finally, survey research is conducted by asking respondents contrived questions in artificial environments.

Bottom line: You need to use the best research tools possible combined with your knowledge of the industry and good judgment in making inferences on how best to design or change a product's design. And stay away from Kano.

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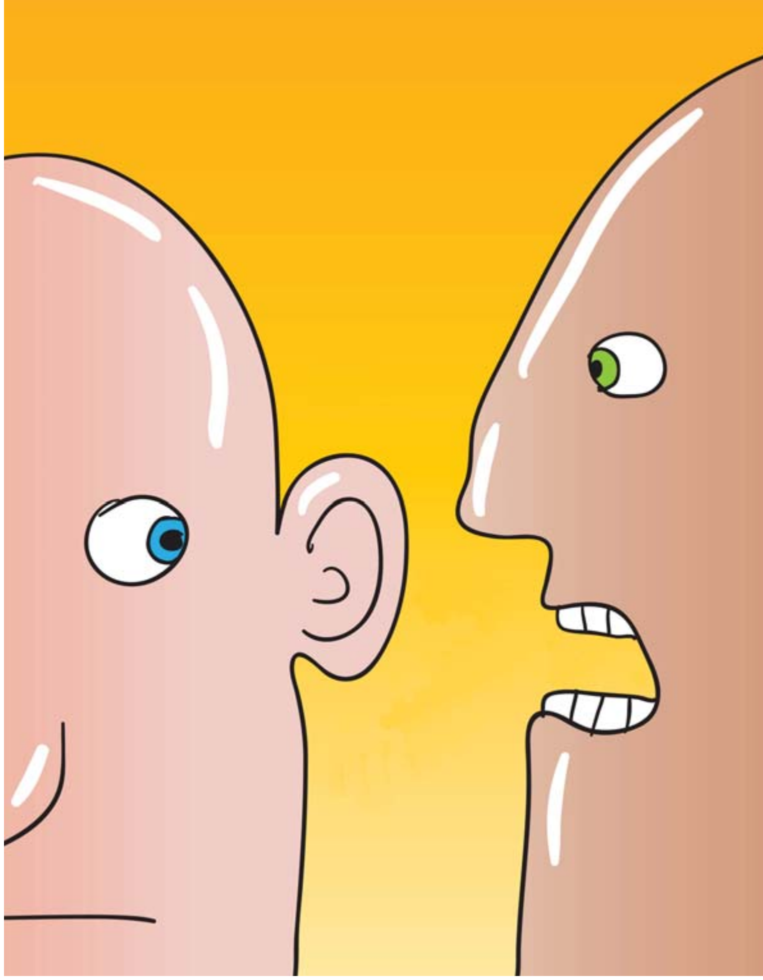
It's not crazy to listen to these voices



Don't ignore what your competitors' customers and partners have to say

| By Sean Campbell

snapshot

The author explores the value and importance of tracking and incorporating the voices of your competitors' customers and partners/influencers into your organization.

Why do so many organizations fail to listen to the voice of the competitor? Hubris. While hubris is not new, whether we are talking about Roman emperors or business leaders in the 21st century, it is clear that hubris is still an organization killer.

But what can inoculate us from the disease? I believe the simplest and most straightforward way to protect against hubris is to bring the outside world in.

Bring the voice of the competitor's customers, the voice of their partners and the voice of their products into your own building. Make it clear that the competitor should not be ignored. Make it clear that the competitor can and should be beaten. And when they cannot, make it clear under what circumstances they are likely to win, regardless of your best efforts.

What are the steps to doing this effectively? How can you bring the voice of the competitor into your offices, into your conference rooms and into your corporate campus?

Here are the three voices you will need to research, package and disseminate within your own company:

The voice of the competitor's customers. You need to understand why they bought from the competitor and why they might again.

The voice of the competitor's influencers. You need to understand why they are so interested in promoting another company's products.

The voice of the competitor's partners. You need to understand why partners bond with the competitor and why they sometimes choose that relationship over one with you.

What about VOC – the voice of the customer? Many organizations have buckets of data on their own customers. They have so much data on their own customers that they send them Christmas cards, birthday cards, mailers of every kind and in many

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cases they essentially know what their own customers are going to want before those same customers know it themselves.

But does all this data, on your own customers, lead to insight on where the market is headed? Does it help you win new customers or enter new markets?

It may. But likely and sadly it does not in the grand majority of cases.

This is because of having a bucket of (even big...) data on your own

Each partner is a sensor of sorts, listening and sifting through the stream of offers and counteroffers that other potential partners (your competitors) might be able to provide.

customers is only half the picture you need. And a focus on only half of the picture is evident everywhere you look in many large companies.

For example, if you were to walk into a typical meeting in a large company you might find that much of the discussion centers on who the company's customers "are" or "are not." You're also likely to find that much of the discussion keeps returning to the same customer archetypes. In addition, if you were to jump into a time machine, you might find these very same archetypes being discussed five, 10, or even 15 or 20 years ago, perhaps in the very same conference rooms.

In addition, some companies, particularly those of long standing, turn these customer archetypes into a company creation story, one that typically goes back to the dawn of the organization. In this story the company "gets" a certain type of customer. In fact, in this story, they are the only ones who "get" the needs of this particular customer in a particular industry.

In this type of environment the voice of the competitor is muted, so much so in fact that the competitor appears incapable of meeting the needs of anyone.

But what if someone else has met the customer's requirements, fully and completely? So completely in fact that you weren't even given a seat at the negotiating table?

Here are just a few classic examples of companies that failed to listen to the voice of the competitor before it was too late.

Digital Equipment Corp. – PCs will never beat microcomputers.
Kodak – Digital isn't as good as film.
Sears – Kmart won't steal our customers.
Kmart – Target and Walmart won't steal our customers.

Alongside some modern-day examples as well:

Best Buy – No one will buy a TV online (Amazon).
Microsoft – Mobile will never beat PCs. (iOS/Android).
Novell – We can do open-source better than Red Hat, closed-source better than Microsoft.
BlackBerry – The world likes a physical keyboard and always will.

So what can help move us:

- from competitor profiles that are based on myth to those that are based on fact;
- toward an understanding of a customer's key buying criteria that is objective and not rooted in our own preconceptions; and
- toward a complete understanding of the "job" that the market wants done today as opposed to yesterday?

Marrying our knowledge of our current customer with that of the voice of the competitor. How does an organization effectively bring the voice of the competitor into the building? How does it make it so that it truly understands how the competitor is being successful and decide where to go head-to-head and where to differentiate?

The competitor's customers

The first step is to find the competitor's customers. And fortunately that process is a much easier than it would have been in years past. To understand the difference let's first take a step back to the year 2000. Back then, we were just getting over our (misplaced fear) of Y2K, *Gladiator* was one of the most popular movies of the year and most homes were connecting to the Internet using dial-up.

So what did a typical sales and marketing process look like in that world? For starters, the (desk) phone was in use a great deal more, as were in-person visits. And a Web page wasn't much more than an inventory of a company's products and services. Therefore the Web was a far cry from the interactive portals that we see today.

But what does this have to do with voice-of-the-competitor research? A great deal.

Given the fact that sales cycles, marketing cycles, hiring cycles and much of what business is was not conducted via the Web in the year 2000, a competitor's customers did not leave a meaningfully-sized digital exhaust or smoke trail, if you will, about who they were engaging with, buying from or were happy to evangelize in a public (Web-based) setting.

In fact most of the knowledge about what a customer was doing with suppliers, vendors and partners could only be identified via phone chats or in-person visits with sellers, marketers, customer service reps, friends, family and business colleagues.

In 2000, it was very difficult to determine who a competitor's customers actually were, primarily because much of this customer activity occurred within the bounds of "closed" networks. In addition, any invitation to join these networks was unlikely to be extended to a company that offered a competing solution to the one an organization just purchased.

In fact it could be so difficult to find specific customers of a competitor that it was easier to say that it was impossible. Hence, it was simpler and more effective to research your own customers and hope for the best in terms of developing an understanding about the market.

But it's now 2015 and you don't

have to do that anymore. You can identify a large number of your competitor's customers. You can identify their partners and you can identify influencers. You can even clearly see the messages that they are pushing to customers across various sales and marketing channels. All of which leads to you bringing the voice of the competitor into your building. A process which will keep your own sales, marketing, strategy and product development efforts more in line with the world around you.

Build out a list

Let's walk through how we might build out a list of the competitor's customers using reverse engineering. Why reverse engineering, you might ask? Because misappropriating a list of your competitor's customers is very likely to be against the law and will typically be considered unethical even if not strictly illegal. But what is completely above board is looking for and building out a list of your competitor's customers from open-source intelligence assets (OSINT).

Here are a few examples:

- You can mine LinkedIn profiles to look for instances where the competitor's products are mentioned. In some cases employees will list a product as a skill that they acquired on the job. This technique also works particularly well in industries that are more technical or are engineering oriented.
- Mining job postings can be fruitful. You should begin by looking for job postings that mention the competitor's products or services. Seeing a competitor's products in an organization's job posting is a clear sign that the products are in use (or soon will be) by that company.
- A competitor's own case studies can contain a treasure trove of data. You can see the types of companies they have sold to and even get a sense of what industries they have successfully worked with in the past.
- Broad-based social media mining, across Twitter and other social networks, can also uncover customers who are commenting about the competitor's products and where they are currently in use.

These are just a few of the ways in which you might identify a company's current customers. The important thing to note is that none of these approaches involve mining your own CRM system for "losses." While we don't discount CRM-based loss data entirely, we feel an over-reliance on it can be problematic, simply because loss-based data, by itself, can't meaningfully answer the following questions:

- Why didn't we even have a seat at the table when the customer was making a decision?
- What customer segments are our competitors active in today that we are not?
- What verticals are our competitors active in today that we are not?
- What type of geographies are our competitors active in today that we are not?

In short, if you filter your analysis down to where "you" play today you likely won't see the full playing field that you and your competitors play on. If you lack that kind of full-court visibility you might be enhancing your competitor's long-term chances at the expense of yours.

Influencers and partners

Outside of the competitor's customers what other voices do we need to hear from when conducting voice-of-the-competitor research? A competitor's influencers and its partners. This may seem an interesting choice given these organizations are not strictly customers per se but the role these organizations play as information brokers is vital.

A partner network's ability to limit or promote certain messages can make or break the fortunes of a company. In fact, this effect has been widely studied and discussed in a number of popular books such as *Co-Opetition* and *The Wide Lens*. As Ron Adner puts it in *The Wide Lens*, understanding your partners is important because "When you rely on partners to enable your success, your success becomes vulnerable to your partners' progress."

But if this is so, why do companies frequently fail to research their competitors' partner networks as well? Why do they not ask questions like the following?

- What drives a partner to join a competitor's partner program?
- What benefits (direct and indirect) do they receive from joining the program?
- How many of our current partners are also partners of the competitor?
- If a partner organization could only join one program (ours or theirs) which one looks better on paper? Which one looks better after one year of being in the program?
- Is the competitor's partner program growing or shrinking and where is this activity most prevalent?
- What type of role does the competitor's partner program play in their business success? (Assume it may not be the same as yours.)

Unfortunately, in many cases, organizations assume that each partner is a captive asset – thereby treating partners as if they were a "child" business rather than a business in their own right and expecting them to be more interested in what their "parent" is doing than the world around them.

In fact, the great majority of your partners are very aware of the options they have before them – which is one of the reasons interacting with your own partners and those of the competitor can generate such solid insights. Each partner is a sensor of sorts, listening and sifting through the stream of offers and counteroffers that other potential partners (your competitors) might be able to provide.

In fact, we like to say that one partner interview is worth five customer interviews because a partner interacts with more of the market on a daily, weekly, monthly and yearly basis than any typical customer might.

Unfortunately, many organizations see their partners as only receiving communication from one channel: themselves. And in fact, there is not just one reason (that 1:5 ratio) but instead are two reasons you might talk to partners.

For many obvious and practical reasons there is information about your competitor that you will never have firsthand access to. Beyond any practical ethical and legal considerations that might leap to mind, you simply don't work in the competitor's building and therefore your knowledge of operations, investments, future plans, etc., is going to be through secondhand sources.

But if you consider yourself to be first and foremost a reporter of true market conditions, as a researcher you are going to want to find the most efficient pathway to the truth.

And partners provide just such a pathway. For example, your competitors are regularly speaking to their partners (and potentially yours) about why they are a good buy. Common topics of conversation include: the competitor's product futures; current pricing models; future pricing models; expansion plans; and competitor counter-pitches.

What's perhaps most interesting is that as your competitor pitches themselves to new partners many of the same subject areas mentioned above are also covered in these conversations. Hence your own partners may have visibility into the very questions outlined above, simply because they've been pitched by the competition. But you'll only know that if you take the time to reach out and ask.

We'll offer the same advice here that we did when talking about interacting with the competitor's customers: Don't just interact with partners who are currently engaged with you or the competitor. Look for those partners in regions, industries or segments who have yet to commit to either of you. These more agnostic players can sometimes provide a clear signal as to where the market may be headed next and what your future (and those of your competitors) might be in it.

Fortunately, with the right amount of effort, partners can be easily identified and then inserted into voice-of-the-competitor research efforts.

Some examples include:

- A company's own partner conference, as many of a company's own partners are working with organizations that they compete with, either indirectly or directly. (That's why it's called co-opetition.)
- Partner portals. These are put up by the competition or third parties. In many cases you'll be able to quickly identify partners in your region or focus area.
- Business social networks and simple Web searches. Partners have their own business to lead and drive, hence they will be driving their own evangelism, marketing and sales efforts. Therefore, even simple Google searches can turn up a wide range of potential partners to talk to.

Finding a competitor's partners isn't usually the hard part. Think about it: They want to be found. What is important is to have a plan to engage these organizations from the start of the research effort and to have the right questions in hand when the conversations start.

Best chance of survival

History has shown that companies that understand the world they live in have the best chance of survival. Focusing your efforts on half the puzzle, the voice of your own customers, and ignoring the rest, the voice of the competitor, is likely to leave you with blind spots at best and a company that is at risk at the worst.

Don't make that mistake. Ensure that your own employees have a clear an unbiased view of the market and your competitors before you: plan your next product launch; develop your next set of sales messaging; build out a new marketing campaign; or develop corporate strategy. As Ralph Waldo Emerson said, "Unless you try to do something beyond what you have already mastered, you will never grow."

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••• marketing research in china

A few bits of advice

With fieldwork in China, prepare for a range of possibilities

| By Steven Hansen

snapshot

Author Steven Hansen offers tips on conducting research in China, including his experiences with recruiting, incentives and how to assemble an effective research team.

Let's say your marketing team or research group is on its first or second or third assignment in China. You know what decisions you need to make, the information you need to gather, who you need to talk to and so on. Obviously you're aware, too, that to some extent in any market you get what you pay for. You don't expect something for nothing. But are your expectations for China in line with what's possible in China? Based on years of working in strategic marketing in Beijing, I'll offer a parable and suggest two China-specific market research roles that can improve your odds of success.

The parable of the out-of-range masonry bit:
Chinese saying: Yi fen qian yi fen huo
Literal translation: One penny, one unit of goods
Idiomatically: You get what you pay for

In 2009, I'd just moved to Beijing and purchased a low-end electric hammer drill so I could hang some items on my apartment's rock-hard plaster walls. Bit 1 was included in the drillbox: a masonry bit just the right size for my wall anchors. At purchase time, the saleswoman had surprised me by throwing in, for free, Bit 2, a masonry bit of exactly the same size and shape as Bit 1. "It will be better than the one in the box," she explained.

Masonry Bit 1

At home, setting aside Bit 2 as a backup, I fitted the original bit from the box into the drill and began work on my first hole. ZZZZZZZZZZ! Lots of noise. But where was my hole? I pressed harder on the drill. Surely the plaster couldn't be that hard? After a few more seconds, but no progress on the hole, I stopped and inspected. In the plaster there was only a small impression. In the drill, though, the masonry bit was in a sorry

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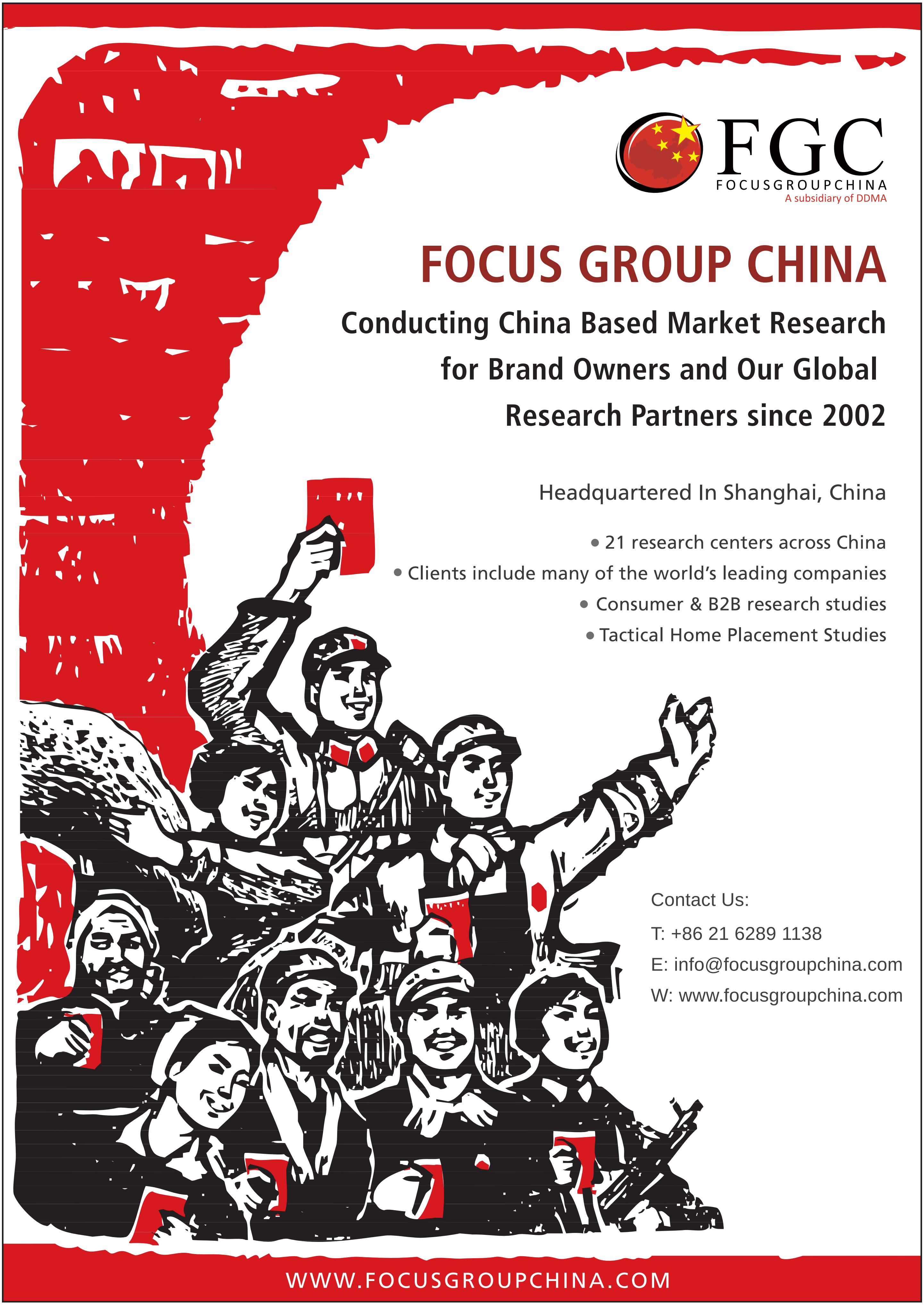
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state, worn completely through the tip as if I'd been drilling on titanium.

Masonry Bit 2

Dumbfounded and sure now that my walls were infused with granite, I took out the bit the saleswoman had given me. With some leaning on the hammer drill, it began burrowing into the wall and slowly made my first hole. Wow. That was slow and I guess these walls really are hard. But at least I was making progress. I moved on to a second hole, which was even slower. But on the third hole the drill stalled again. No progress. I pulled out the bit to inspect it. Sure enough, the tip was almost gone, worn down to a nub.

Masonry Bit 3

Thinking I'd confront the saleswoman about the epic fail, I boxed up both bits and the drill and went back to the little shop where I'd bought them. The conversation went something like this:

"Well, you said you just wanted to drill a few holes in your walls, that's why I gave you the free bit!"

"But the one in the box didn't even make a single hole!"

"What did you expect! That was the one in the box. Do you think they're going to give you a masonry bit for free? If you want to do a lot of drilling, you have to buy a quality bit!"

Perplexed but with a new paradigm dawning on me, I went home to try the "quality" bit I purchased for 10 yuan, about $1.50. Sure enough, I used that bit the rest of my years in Beijing, drilling holes with abandon in rental apartments all over the city.

And to finish the parable, the paradigm I eventually settled on was "out of range." Bit Number 2, while of very low quality, was within my expected range of possibility. But bit Number 1, which I now call my out-of-range bit, was simply not within my expectations. Before this incident, I wouldn't have imagined that it was possible to buy a masonry drill bit incapable of drilling even a single hole. Yet there it was.

In research, as in much else about China, you have to expand your range of the possible to assure solid execution.

Variance is far greater

Executing a research project, especially with new vendors, is a challenge in any market. At the same time, like the out-of-range masonry bit, the variance is far greater in China than what one might expect in other markets. Here are a few of the out-of-range execution incidents I have experienced in working with local market research vendors:

"Flexible" incentive administration. After following up with respondents in a series of qualitative interviews that had not been as informative as expected, I found that the vendor was paying only an average of half to a third of the incentive amount specified in the contract. Confronted, they insisted (correctly, to the letter of the contract) that they were not required to pay this amount and that it was their standard policy to negotiate with each respondent directly the amount of compensation. Needless to say in subsequent vendor interactions, I made incentive requirements specific and implemented an explicit verification policy.

"Friendly" mall intercepts. In a multi-vendor data collection project, one vendor was having particular trouble meeting deadlines, then suddenly produced a slew of respondents – all of whom were high school-age, rather unexpected for the location. Suspecting fraud, we confronted the vendor. He acknowledged having gotten respondents from his friend's private cram school but insisted the data collection was legitimate because the class was located in the mall, as stipulated in his instructions. We ended up paying for the research but of course eliminating the data, tightening up instructions and contracts and never using that vendor again.

"Unusual" respondent expectations. For a certain series of in-depth interviews we decided not to offer any incentives for fear of potential legal repercussions. The recruiter was instructed to be very clear with potential respondents on this point and we monitored to ensure compliance. Even so, we had to field irate phone calls from multiple respondents after their interviews, complaining that they were not compensated for their time.

"Did the recruiter tell you before the interview that there would be no incentive?"

"Yes, of course they have to say that. I understand. But you can't just ask someone to interview and not compensate them for their time!"

None of this is meant to imply that unexpected problems don't pop up in other countries. It's just that the distribution is a lot fatter in China.

Expect expectations to be wrong

When you've worked for years in a particular market, you pride yourself on having a pretty good idea about the costs and challenges of reaching respondents, conducting surveys, leading focus groups, etc. In China, expect those expectations to be wrong. A couple examples:

Incentives to professionals. In the U.S. it will often cost more to reach a specialist than a generalist and the size of the organization the professional is in might make a difference – but a 10x difference? In one of my earliest China studies, for qualitative work we literally paid pennies on the dollar to reach attorneys in small firms versus large firms, all other factors relatively equal. And for some types of specialists, I've paid three times what I might have expected to pay for a comparable U.S. professional. So much for the myth of cheap China!

Difficulty of reaching wealthy consumers. Although I have little U.S. experience with which to compare, my China experience is that consumers with the means to make purchases at Beijing's many luxury malls are extremely leery of market research. Even personal connections cannot entice many to go on the record, let alone any sort of mere financial incentive. Only the most creative recruiting can work and that doesn't come cheap.

Again it's the parable of the out-of-range bit: an awareness of variance permits prudent precautions.

Easily go astray

As you might expect, translation is always a challenge. But don't stop at finding a quality translator with good references. Especially in surveys, even a faithful translation of the content can easily go astray if it does not reflect the goals of the questions, the appropriate cultural context and the expectations of Chinese respondents.

A professional translation agency will propose a cost per Chinese character and you might think paying at the high end of that range would be enough to ensure your translation is solid. But my own experience is that, over the course of time, I've reaped benefits by paying in fact much more for translation, by including it as an integral part of interview instrument development and viewing it as a core competency of doing research in China rather than viewing it as an afterthought. I'll talk about how you can do that in the next section.

Critical to success

To deal with the enormous variance, the differences in expectations, the cultural and language barriers, I've found filling the following two roles to be critical to success.

Project manager/educator. Regardless of market, each research project has a manager, of course. But in China, I've found that a comparatively more experienced and broad-thinking project manager is worth the extra cost. This person needs to bring to each project not only the requisite skills of project management and execution but they also need to view their role as one of educator. Without being judgmental about the practices that exist in a local vendor's operation, the project manager/educator needs to be an advocate for your requirements, needs and practices and what is important to you throughout the execution of your project.

Translator/strategist. Over time, I got away even from the idea of "translating" market research questionnaires and surveys. Instead, I developed various people, sometimes project managers, sometimes others, who were both bilingual and able quickly to grasp the essential goals of research projects. In this way the goal was more to re-create an instrument in Chinese than to translate it into Chinese. Be forewarned that this approach in itself can create difficulties when translating back into English for reports. "Why didn't you ask exactly the same question as in the English instrument?!" But assuming you've done your homework, the "re-create" approach will always end up with results that deliver on the goals of the original project.

The two roles above may not keep you from every out-of-range masonry bit but they'll go a long way towards managing the unexpected.

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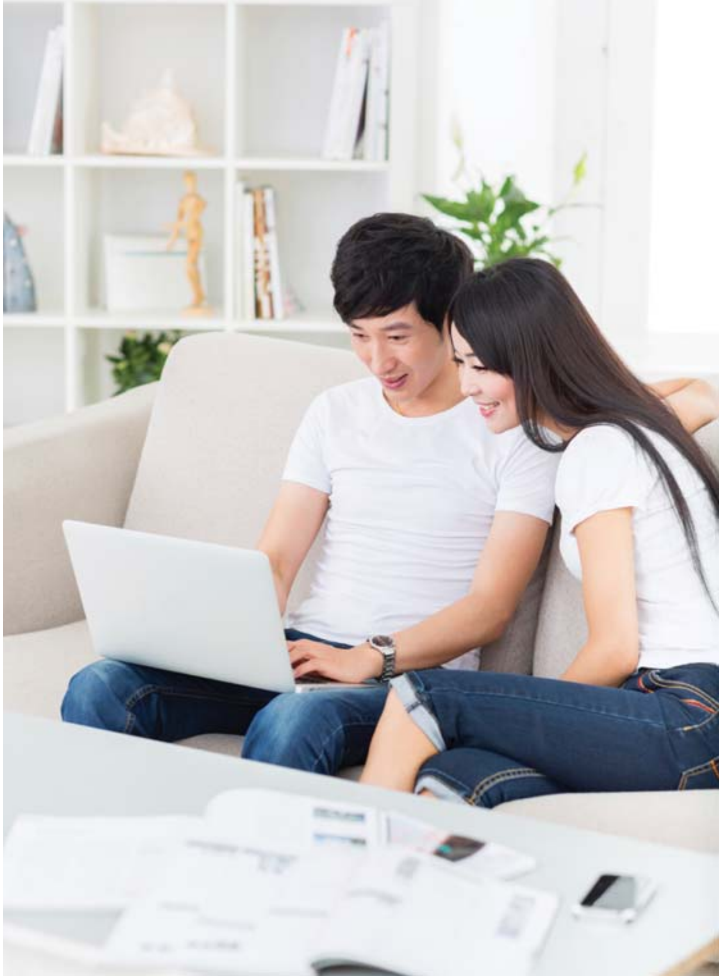
••• marketing research in china

Similar but different

A look at the e-shopping habits of U.S. and Chinese Millennials

| By Richard J. LaRosa, Brian F. Blake, Yang Luming, Kimberly A. Neuendorf and Karen Hudzinski



snapshot

The authors present findings from their study of the differences between e-shopping strategies of U.S. and Chinese Millennials using a framework of six different forms of shopping behavior.

The marketer's world is exploding! Not just in the U.S. but globally as well. Seemingly overnight, consumers are now shopping with new electronic devices like credit-card readers or price-comparison mobile apps. They use new vehicles like digital media stores. They seek information from new sources like vlog review sites. They buy new types of products like e-gift cards. Marketers are scrambling to capitalize on the new opportunities presented, while investigators try to grasp the dynamics of the new shopping landscape. It is an exciting, though daunting, time for marketing researchers.

More and more, clients with e-tail operations want marketing researchers to provide a broad picture of the e-marketplace and the client's position in it. Among other issues, clients are asking: Through which e-channels do shoppers find out about my products/services? What tools do consumers use to shop online? What new e-vehicles can I potentially use to effectively distribute my products? Answering these questions is far from a slam dunk.

First, for us to systematically research our clients' questions, we need a clear delineation of the alternative vehicles now available to consumers to do their shopping. The classification must be comprehensive but reasonably brief.

Second, to devise such a classification, though, we must first start with a clear idea of what is and what is not e-shopping in the current global market. Consider Mary. She is thinking of buying a new kitchen blender, so she asks her Facebook friends what they think of the brands she is considering. Tony is choosing a restaurant for an impromptu dinner with his girlfriend and uses his smartphone to choose a nearby place offering a good coupon. Aren't these just two examples of newer forms of shopping that should be included, along with distributors' sites and other more "traditional" forms of online shopping? To work for a researcher, the definition must be up to date.

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Figure 1: Classification of Digital Tools

It must cover the various shopper behaviors and the different sites or sources of the information/products that exist in the new market reality.

Third, we need hard data to determine which tools are viable communication vehicles for our client in a given target market.

To provide the needed framework, our research team has launched a multifaceted investigation of those consumers in the vanguard of these revolutionary changes. These are the young, educated Millennials in the world's two largest e-shopping markets: the U.S. and China.

Virtual or tangible

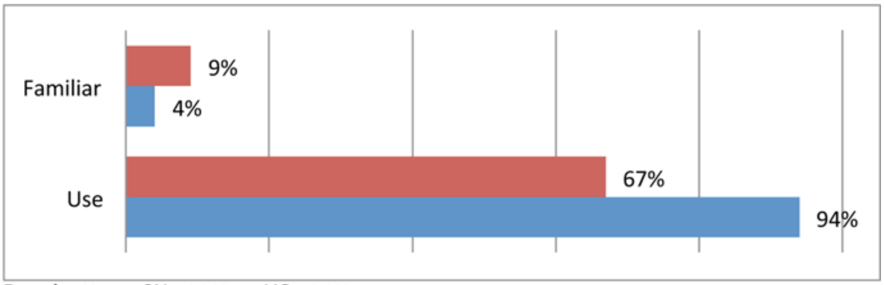
So, how do we define e-shopping? As proposed elsewhere (Blake, LaRosa, Yang, Skalski, Neuendorf and Wu, 2012), e-shopping can be a consumer's primary goal or can occur when a consumer is focusing principally upon other goals (e.g., socializing). So, it occurs not only on sites dedicated to sales/marketing but also on sites focused upon other objectives. Further, it can involve acquiring information intentionally or unintentionally and consumption in virtual or tangible form.

Six different forms of e-shopping behavior, then, are possible:

1. Intentional information acquisition, e.g., browsing for product information via search engines
2. Incidental information acquisition, e.g., learning options available on a BMW when playing Gran Turismo
3. Selecting products for offline consumption, e.g., choosing an auto tire
4. Selecting products for virtual consumption, e.g., choosing music files

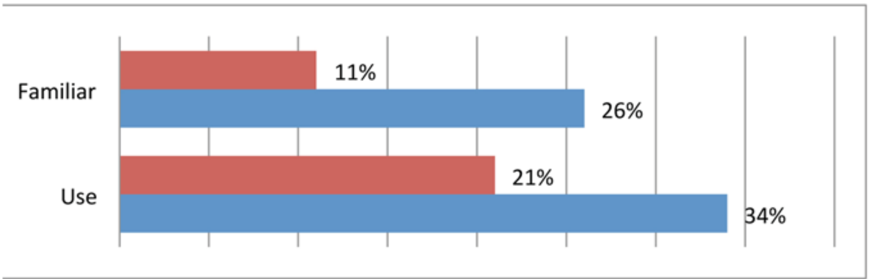
Figure 2: Information/Knowledge-Seeking Tools

Search Engines - Web sites that provide links to information in response to a search term or phrase (i.e., U.S.: google.com; CN: baidu.com).



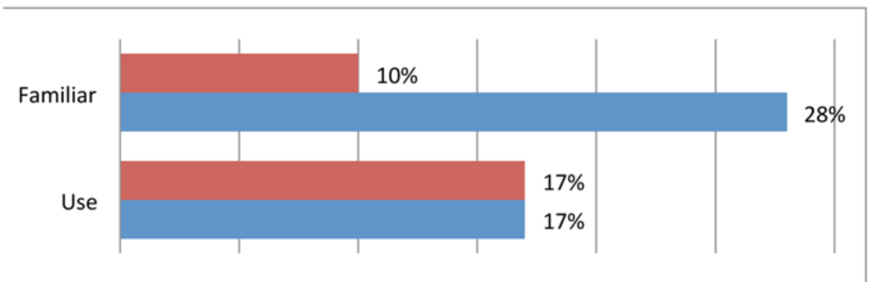
Buy-in %: ■ CN, 88% ■ US, 96%

Price Comparison Sites - show prices of products from different retailers. Price comparison Web sites are accessed online through a Web site (i.e., U.S.: pricegrabber.com; CN: qunar.com).



Buy-in %: ■ CN, 66% ■ US, 57%

Price Comparison Mobile Apps - allow people to compare product prices between stores. Rather than having to go online to a price comparison Web sites, price comparison mobile apps are downloaded for use on someone's cell phone (i.e., U.S.: redlaser.com; CN manmanbuy.com).



Buy-in %: ■ CN, 63% ■ US, 38%

5. Virtually consuming products, e.g., listening to music
6. Using a digital purchase device, e.g., apps for purchasing pizza

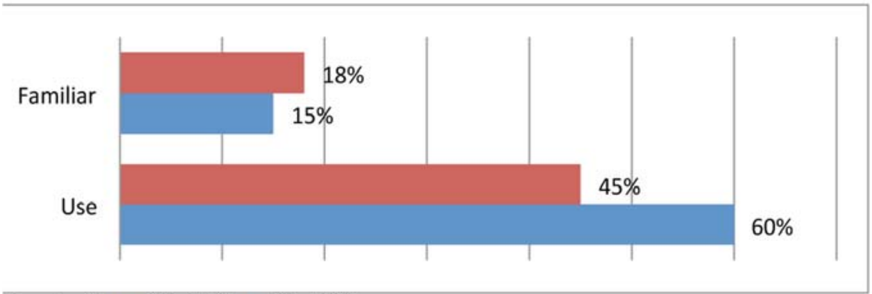
These behaviors are supported through the e-shopping tools presented in Figure 1.

The advent of e-tools has significantly broadened the context of product and service shopping. By far, most instances of e-shopping involve five site sources:

- sales/marketing organizations, e.g., manufacturers, distributors, political parties involving "traditional" B2C commerce;
- other consumers overtly engaging in C2C selling, e.g., selling an item on eBay;
- third-party information sources, e.g., bloggers, price aggregators;
- other persons not overtly selling, e.g., friends complaining about a product on a social media site;
- intruders into sites of other sources, e.g., pop-up ads on a news site.

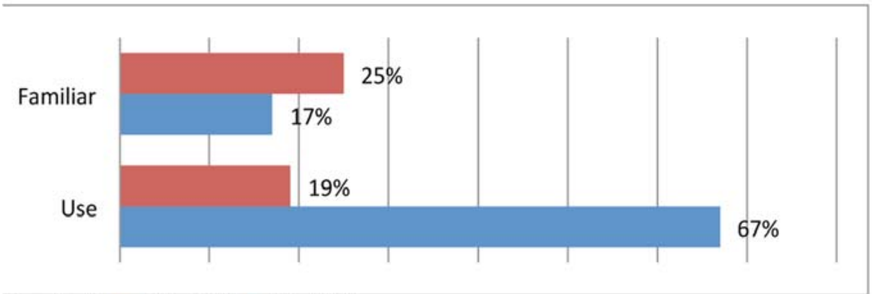
Figure 3: Tools for Purchase of Tangible Products

Online Marketplaces - types of online stores where products information is provided by multiple outside retailers or by other people. Online marketplaces do not sell products from just one manufacturer or company (i.e., U.S.: ebay.com; CN: dangdang.com).



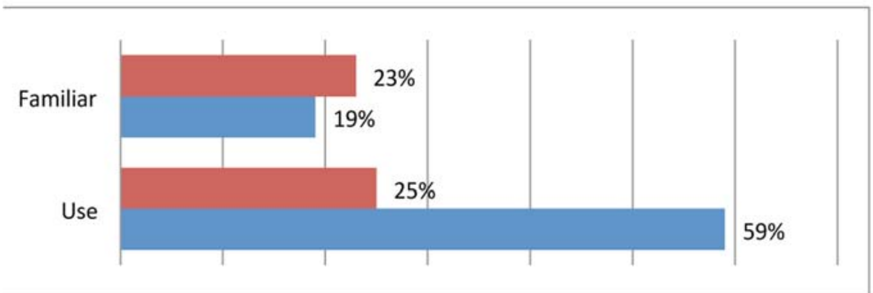
Buy-in %: ■ CN, 71% ■ US, 80%

Manufacturers' Web sites - for people and organizations that offer products or services that are often in one general category. Manufacturers' Web sites are typically all made by the same manufacturer or company (i.e., U.S.: nike.com; CN: bango.com).



Buy-in %: ■ CN, 43% ■ US, 80%

Distributor Web sites - distributor Web sites sell a variety of products from the manufacturers. Sales cannot be made by individual people; instead sales are made by companies (i.e., U.S.: bestbuy.com; CN: suning.com).



Buy-in %: ■ CN, 52% ■ US, 76%

To be useful to researchers, a vehicle classification must accommodate all six forms of shopping behavior and all five site sources.

The data

In the last two years, an online survey in the U.S. recruited 323 Millennials (18-34), students at two large and one smaller university in the east and midwest. The 776 young Millennials in China were students at one large and three small southwestern schools. Respondents were young; 98 percent of the U.S. and 99 percent of the China samples were 18-25. Though these samples are not strictly representative of their respective nations, they certainly can provide the useful point of departure we need.

The questionnaire described 28 different shopping vehicles. For 22 vehicles, respondents indicated whether they "never heard," "heard but unfamiliar," "familiar but never used" or "used at least once or twice." These measures, however, were not relevant for the six tools in the passive and targeted advertising category.

Classification and results

The 22 vehicles are described below. For each we present the percentage of the samples indicating they were familiar (but not used) and use (at least once or twice).

In the bar graphs China is red and the U.S. is blue.

Below each bar graph is a buy-in score. This is a rough gauge of how much a vehicle is described by the old observation "To know 'em is to love 'em." It is the percent of those respondents familiar with a vehicle that has chosen to try it at least once or twice. Naturally, before a firm devises an integrated marketing program, it should know more than the current usage of shopping vehicles in the target market. It would also be valuable if the firm would have some insight into how those current rates might shift. We suggest that the buy-in score helps raise a few flags in this regard.

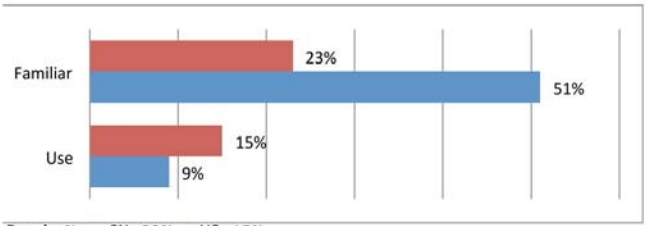
Specifically, if a vehicle has achieved little familiarity as yet in a market but has strong buy-in, we anticipate that usage may well become more widespread as familiarity with the new vehicles spreads. We might label this as a "potential breakout vehicle." Conversely, if a vehicle's familiarity is widespread but usage is low, we might call it a "potential flopper." Illustrated by a firm's sending unsolicited print ads to home or office fax machines, it may be a vehicle out of step with current technology or target shopper lifestyles.

Again, the buy-in percent for China is red and for the U.S. is blue.

Search engines (Figure 2) now have high usage, especially in the U.S. Buy-in is high in both nations. Price-comparison mobile apps are not popular as yet; they but may be headed toward a breakout in China, though not so in the U.S.

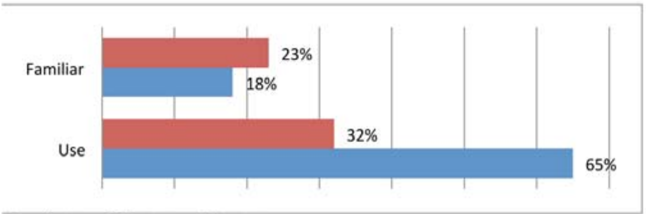
Figure 4: Tools for Purchase of Non-Tangible Products

Social Media Site Goods - social media site goods are real products or services that are purchased only through online social media Web sites. These items are real and delivered offline (i.e., U.S.: facebook.com; CN: renren.com).



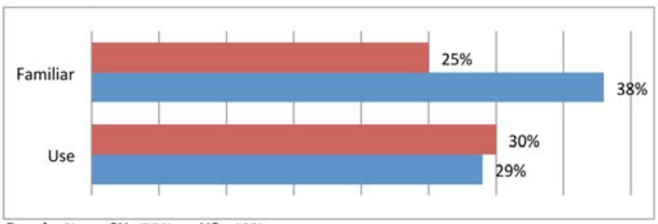
Buy-in %: ■ CN, 39% ■ US, 15%

Digital Media Store - require that people pay for digital media that can be downloaded and saved to a computer, mobile device, gaming system or e-reader (i.e., U.S.: apple.com/iTunes; CN: skycn.com).



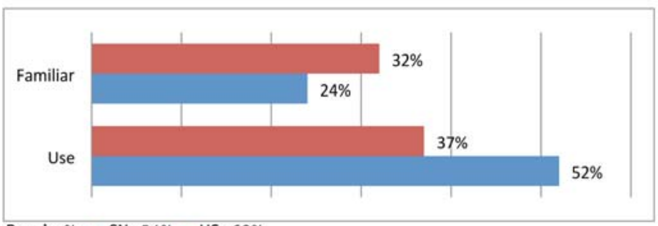
Buy-in %: ■ CN, 58% ■ US, 78%

Virtual Goods Sites - non-physical objects purchased with real money for use in virtual games. These objects are not used in real life (i.e., U.S.: battle.net/wow; CN: wanmei.com).



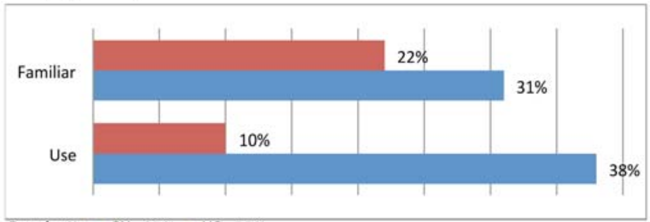
Buy-in %: ■ CN, 55% ■ US, 43%

Pay for Content Products/Services - paid access to online content, but someone does not have permanent access to that content. People choose when their content expires such as when they do not renew their membership or subscription (i.e., U.S.: nytimes.com; CN: xunlei.com).



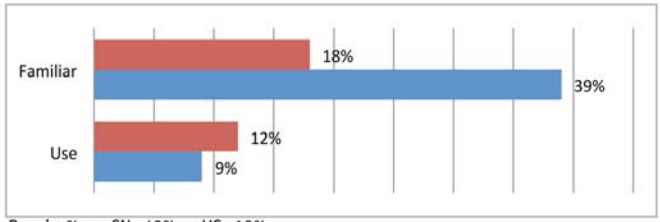
Buy-in %: ■ CN, 54% ■ US, 68%

Electronic (Software) Rental Sites - products or services where the software is available for a limited time through a temporary license (i.e., U.S.: spss.com; CN: yonyou.com).



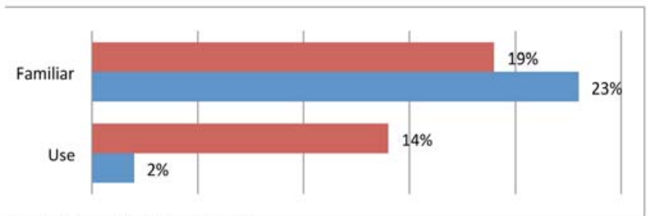
Buy-in %: ■ CN, 31% ■ US, 55%

E-mail Gift Card - a play on traditional, physical gift cards. E-mail gift cards are non-physical gift cards that are purchased online and are delivered to the recipient's e-mail inbox (i.e., U.S.: giftcards.com; CN: card.yinsha.com).



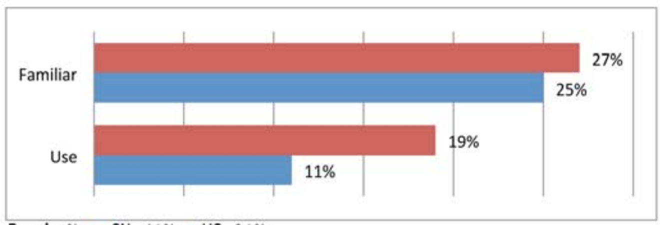
Buy-in %: ■ CN, 40% ■ US, 19%

Mobile Text Message Gift Cards - electronic gift cards that are purchased through someone's cell phone and delivered to the recipient's cell phone. These are distinct from e-mail gift cards because the recipient receives the mobile gift card in a text message (i.e., U.S.: ae.com; CN: ctrip.com).



Buy-in %: ■ CN, 42% ■ US, 8%

Points-Redeemable Mobile Apps - allow someone to earn virtual points for doing activities suggested by the app. These virtual points can be exchanged for real products and services that can be used in real life (i.e., U.S.: viggle.com; CN: qq.com).



Buy-in %: ■ CN. 41% ■ US. 31%

Manufacturer Web sites are shaky in the Chinese sample, with modest current usage and modest buy-in (Figure 3). Distributor sites are fairly similar in this regard. For online marketplaces, on the other hand, usage is substantial, particularly in the U.S., with strong buy-in in both markets.

Social media site goods differ dramatically from digital media stores (Figure 4). In the U.S., social media site goods, with considerably higher familiarity than usage, show indications of flopping. In contrast, in the U.S. social media stores are strong now and have good buy-in. Further, in the U.S. digital media stores may be ready for a breakout. The value of virtual site goods, though, is more tenuous. In China, social media site goods, digital media stores, and virtual goods sites are moderately healthy.

Pay-for-content vehicles display good current usage and even better potential in the U.S. This is true to a lesser degree in China. On the other hand, in the U.S., sample e-mail gift cards and text message gift cards look weak now and perhaps may weaken further among U.S. Millennials.

Generally, the U.S. and Chinese patterns are distinctive.

Credit card readers for mobile devices (Figure 5) enjoy only modest current usage in the U.S. and China. Buy-in scores, though, suggest that usage by Millennials may grow as awareness improves in China. This growth may not be as likely in the U.S. Mobile apps for making a purchase enjoy moderate health in both national samples.

In China, blog and microblog sites are strong now and offer evidence of becoming stronger (Figure 6). Such strength is not as evident in the U.S. In both Millennial groups, review site and forums/message boards are used often and have positive buy-in.

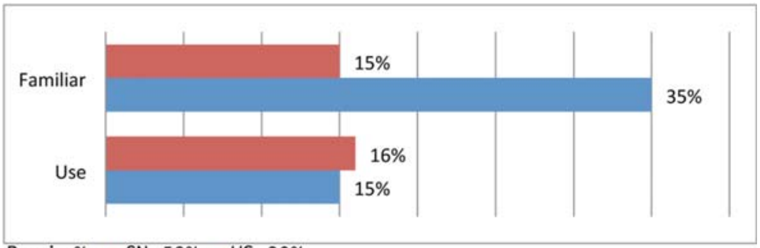
Requested e-mail and requested text-message marketing offer marketers potential in both Millennial samples (Figure 7).

Recommendations

First, we researchers should consider the vehicle classification offered here. It is quite inclusive, current

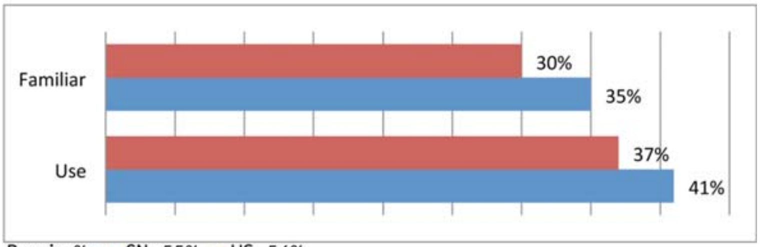
Figure 5: Tools for Digital Purchase Devices

Credit Card Readers for Mobile Devices - attachable devices that allow people to make purchases or payments by swiping their credit cards through the attachable card reader. Most card readers also require someone to download a mobile app to use the card reader (i.e., U.S.: squareup.com; CN: cmbchina.com).



Buy-in %: ■ CN, 52% ■ US, 30%

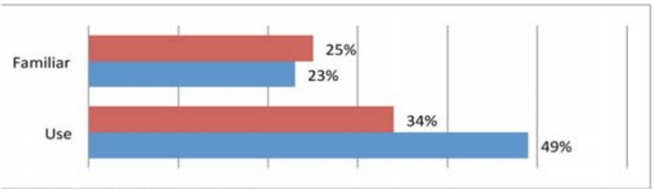
Mobile Apps for Making a Purchase - downloaded onto someone's mobile devices. These apps let people browse restaurant menus or search product information, which may or may not lead to placing an order or making a purchase (i.e., U.S.: chipotle.com; CN: coolgaga.com).



Buy-in %: ■ CN, 55% ■ US, 54%

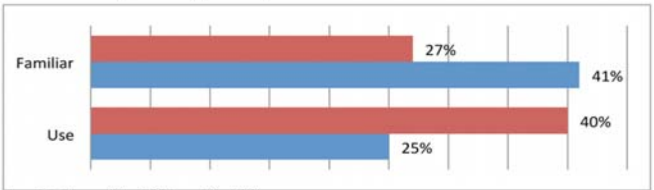
Figure 6: Co-Produced And Co-Consumed Tools

Review Web sites - Web sites where people can post reviews for products or services. Some review sites also contain review from professional critics (i.e., U.S.: tripadvisor.com; CN: taobao.com).



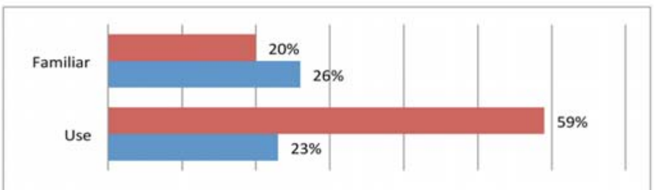
Buy-in %: ■ CN, 58% ■ US, 68%

Blog Web sites - generally used to post online diaries. These blogs may include discussion sections across a broad range of ideas and topic areas (i.e., U.S.: postsecret.com; CN: blogcn.com).



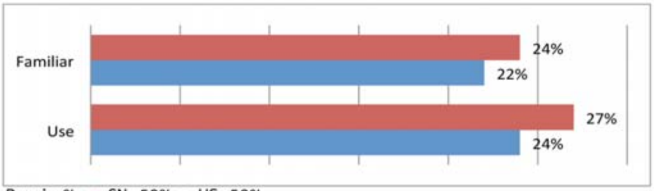
Buy-in %: ■ CN, 60% ■ US, 38%

Microblogging Web sites - have set-ups that are similar to traditional blog Web sites, except the posts are usually smaller in both actual size and the size of the files; for example, there are usually character limits on microblogging Web sites (i.e., U.S.: twitter.com; CN: weibo.com).



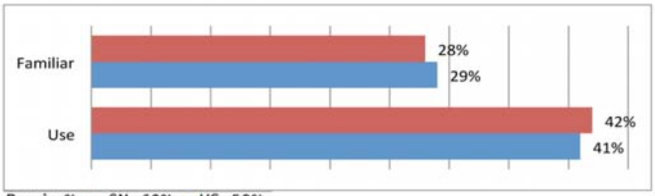
Buy-in %: ■ CN, 75% ■ US, 47%

Vlog Review Web sites - have set-ups that are a variation of blog Web sites, but instead of being typed, vlogs are filmed and uploaded (i.e., U.S.: youtube.com; CN: youku.com).



Buy-in %: ■ CN, 53% ■ US, 52%

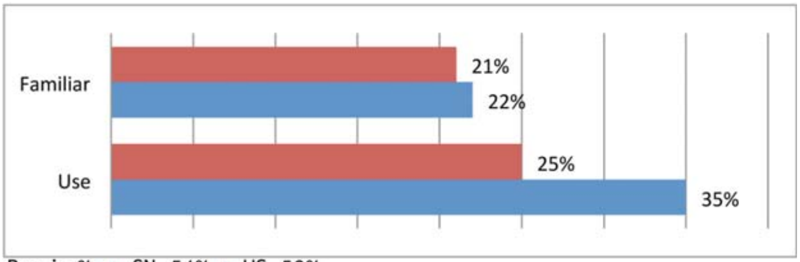
Forum Web Sites/Message Boards - online discussion sites where people can have conversations in the form of posted messages. Messages are stored at least temporarily. Forum Web sites/message boards differ from review Web sites because they are meant to be conversations and back-and-forth exchanges or ideas (i.e., U.S.: ask.com; CN: tianya.cn.com).



Buy-in %: ■ CN, 60% ■ US, 59%

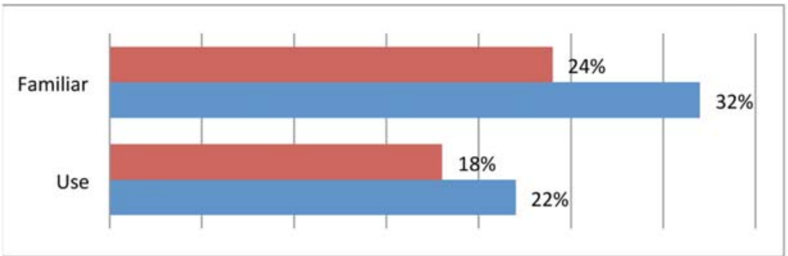
Figure 7: Recipient-Directed Tools

Requested E-Mail Marketing - includes advertisements and coupons that are delivered to people through e-mail from a store or company. These people have signed up and asked to receive these e-mail notifications (i.e., U.S.: groupon.com; CN: nuomi.com).



Buy-in %: ■ CN, 54% ■ US, 52%

Requested Text Message Marketing - includes electronic messages sent to someone's cell phone with information about products and services offered by that company. People have signed up and asked to receive these notifications (i.e., U.S.: vanityclothing.com; CN: dangdang.com).



Buy-in %: ■ CN, 43% ■ US, 41%

and incorporates all six shopping behaviors and five site sources. It usefully flags for marketers some of the less obvious means by which consumers learn about and obtain their products. The classification can, then, serve as a heuristic, suggesting currently unused vehicles marketers can employ in a well-integrated marketing campaign.

Second, as researchers we should not base our analyses and recommendations on the assumption that Millennials are invariably in the forefront of technological innovation. While this may or may not be true when we compare Millennials to other market sectors, the Millennials sampled here have not overwhelmingly turned to the newer vehicles as yet.

Third, be alert to the, at times, great differences between the world's two largest e-commerce markets in their reactions to e-shopping vehicles. Figure 4 is particularly clear on this point.

Finally, best practices and rules of thumb cannot necessarily be generalized from one national market to the other, no matter how successful those ideas are in either market considered alone. It is our responsibility as researchers to identify what can and what cannot be generalized to other national markets.

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••• marketing research in china

A growing force

The innovation generation in a changing China

| By Michael Stanat

snapshot

Michael Stanat looks at some of the forces of change that are buffeting China and how researchers should respond to them.

China's Millennials represent one of the largest population segments in the world, with over 300 million people. Born during unprecedented times of economic growth and development in the 1980s, this generation now wields substantial influence on business, economic development and culture.

Unlike in Europe and America, studies show that China's Generation Y is economically better off than their parents. They are one of the best-educated and most affluent segments and have more English-speaking people inside the country than any generation in the past. This young generation continues to steadily exert their influence on the world's second-largest superpower in society, business and culture.

For the first time in years, economic growth has begun to slow from 10 percent to rates around 7 percent annually. Some fear that declining growth, an aging population and other challenges could further reduce economic expansion. The Chinese government recently enacted policies that favor transitioning to a more consumption-based economy. This may challenge the sensibilities of Chinese consumers who traditionally value saving cash over consumption.

These seismic changes will significantly impact peoples' attitudes and behaviors in the marketplace. For researchers, understanding consumer attitudes and behaviors in this quickly-developing marketplace is important. Consider the following changes and trends impacting China's huge Gen Y demographic.

The evolving Internet culture. China has almost double the number of Internet users than the entire U.S. population, with recent estimates putting that number at 600 million people and growing. Gen Y is very socially engaged and represents the majority of Internet users in China. Global research studies have shown that Millennials there spend much more time online than their contemporaries in other developed economies. These habits are important to marketers and researchers who aim to generate insight on attitudes and preferences, track changing trends and uncover opportunities.

Chinese social media is diverse and expansive, featuring its own domestic social brands including Weibo (microblogging) and WeChat (instant messaging). Internet memes, viral media and online slang are increasingly popular among young citizens, despite Internet restrictions and occasional

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censorship crackdowns. Because social media is vital for this generation, they are more brand conscious than those who have come before them. The nature of social media, which encourages peer review and sharing of reviews, increases the importance of word of mouth and the need for customer feedback.

Mobile and e-commerce innovation. Every day, hundreds of millions of people access their smartphones in China. According to the government's China Internet Network Information Center (CNNIC), 2014 was the first year that more people accessed the Internet by mobile than by personal computers. It's no surprise that the demand for mobile devices is high. A *Washington Post* report in late 2014 found that versions of iPhone 6 were fetching over 10 times their selling price in the U.S.

Apple and Samsung have spent years vying for market share. Xiaomi, a new domestic competitor with far less economy of scale and marketing power, has recently threatened to significantly disrupt the market with its affordable smartphones. Founded in 2010 by former Google executives, Xiaomi has made industry inroads by marketing its affordable, high-quality products through effective online social media campaigns. Of course, competition in the world's largest smartphone market is notoriously fierce. Xiaomi's rapid ascent to a 14 percent market share in 2014 (according to the *Wall Street Journal*) is most impressive, considering it appealed heavily to urban Millennials and designed its products with a mix of foreign and domestic talent. The significance of this accomplishment cannot be underestimated in China's highly competitive consumer electronics industry.

Xiaomi subsequently received glowing press and praise for its successes in Asia. In January, it announced that it intended to expand in Brazil and it made further waves by hinting at possible expansion to U.S markets.

E-commerce. It's a common perception that Chinese firms are traditionally better at imitation than innovation but this view is now being challenged. Recently, Chinese firms have made bold strides in e-commerce. One example is the Alibaba Group, which recently launched one of the world's largest IPOs, surprising investment analysts around the globe.

The growth of e-commerce in China is unprecedented. A decade ago, Chinese consumers were wary of online transactions. They tended to prefer face-to-face buying, customer service and cash transactions. These elements were the key drivers of product quality.

The rise of e-commerce in China is doubly surprising because the red tape of importing and exporting products there can be extremely challenging. China places significant tariffs and customs restrictions on foreign imports. Statistically, China ranks 90th out of 180 countries in the World Bank's Ease of Doing Business reports.

Alibaba's online portfolio of Web sites has proven to be tremendously successful. Tao Bao is an online marketplace where consumers and businesses can buy and sell goods. T Mall, operated by Alibaba, provides online storefronts for manufacturers. This B2C platform has enabled Western multinationals to more easily export to China, bridging cultural gaps and allowing businesses to successfully enter this burgeoning new marketplace and to reassure Chinese consumers regarding the affordability and quality of their products.

Travel and tourism. The rise of the middle class has enabled a growing segment of the population to travel internationally. Chinese tourism is on the rise and it is reaching beyond Hong Kong, Macau, Japan and South Korea. Increasingly, these tourists are heading to Europe and to the U.S.

While Chinese consumers' international tourism habits have traditionally focused on sightseeing in capitals and large cities, Millennial tourism is broadening to leisure, beach travel, backpacking and other recreational tourism.

Our firm has conducted in-depth research among Chinese leisure and business travelers, journeying inbound to and outbound from China. There are important factors influencing the preferences of Chinese travelers. Additionally, Chinese culture tends to strongly value relationships and word of mouth. As a result, group travel is popular. Feedback from friends and family is important in decision-making when choosing destinations and hotels. For international travel, customized hospitality and amenities that make them feel comfortable and at home are viewed positively. Chinese-language service and food service are also helpful in improving the travel experience.

Wine, beer and spirits market. China is already one of the world's largest wine markets and is the largest red wine market, surpassing the U.S. and France. Western wines, beers and liquors are quickly becoming popular.

Interestingly, wine and beer are status symbols among urban young people and have become signs of China's growing middle class. In my experience researching China's Millennials, premium alcohol brands can serve as a form of conspicuous consumption to communicate status in a hierarchical society. Relationships and *guanxi*, or one's status and social network, remain very important cultural values. In addition, gifting is an important cultural value and driver of wine sales, particularly during the holidays.

Innovation is already happening in packaging, digital marketing and logistics. It may be some time before Chinese wines become an export to Europe and the U.S., but in Africa and other emerging markets where China's influence is rising, that day could come soon.

Recommended research approaches

In terms of recommended research approaches to make sense of this evolving landscape, hybrid methods can be helpful when researching dynamic subjects. Ethnography, both in-person and online, can be useful in understanding lifestyles, values, norms and buyer experience. It can convey visually how people view the world and the changes happening in it. Focus groups and in-depth interviews can provide deep insight to changing trends and perspectives. Quantitative methods can test and measure findings. Given the rise of many customer touchpoints, new online methods can be implemented in places where Internet users congregate.

Much is changing for Chinese Millennials – their economy, technology, business, culture and attitudes. The skylines of Chinese cities are changing, as are the fundamental ways people communicate. Who better to help businesses as they take stock of the opportunities and challenges presented by Chinese Millennials than researchers? No one is better suited to adding value by guiding organizations in their understanding of the evolving attitudes, opinions, habits and preferences of this powerful group of consumers.

Michael Stanat is global marketing director at SIS International Research, New York. He can be reached at mstanat@sis-international.com.

Names of Note

In Memoriam...

■ **Adrienne Goldbaum**, co-founder of *LA Research*, Los Angeles, died on January 30, 2015, in Oxnard, Calif. She served on the boards of the Southern California chapter of the Market Research Association and the MRA Southwest chapter.

■ **Barry Williams** has been named chief customer officer for *Asda*, the Leeds, U.K., supermarket chain.

■ *TNS* has named **Federico Capeci** chief digital officer and CEO for TNS Italy, based in Milan. **Paolo Mistrorigo** has also joined as chief operating officer and chief transformation officer.

■ **Alexandre Callay** has joined sports marketing research firm *Repucom*, Stamford, Conn., as global director, media research and content. The firm also tapped **Malph Minns** for its U.K. and Ireland team based in London and announced a realignment of its European business operations into a single business unit and the departure of current European president **Marcel Cordes**.

■ *The WaterWalk Hotel and Apartments*, Wichita, Kan., has hired **Erica Weishaar** as business analyst to manage all marketing research for the apartment properties.

■ **Darren Howard** has joined *Answer Financial*, an Encino, Calif., auto and home insurance agency, as chief marketing officer.

quirks.com/articles/2015/20150412

■ *Sunshine Bancorp*, Tallahassee, Fla., has appointed **Michelle Kounlavong** as AVP, marketing director. She will direct bank marketing and advertising, including brand identity, strategic planning, market research and communications.


Evans

■ *Directions Research*, Cincinnati, has hired **Lisa Evans** as vice president of client services and **Margaret Becker** as senior project manager. Evans will be based in Austin, Texas.


Becker

■ In Port Washington, N.Y., research firm the *NPD Group* has added **Robby Hart** as head of analytics and modeling; **Steve Thornberry** as SVP solutions consulting and **Jim Hirshfield**, SVP solutions architecture.

■ *Rita's Italian Ice*, a 600-unit chain based in Philadelphia, has named **Robin Seward** chief marketing officer.

■ **Matt McNerney** has left his position as president of *Ipsos Marketquest*, New York, after seven years with the firm.

■ *EDigital Research*, Hampshire, U.K., has expanded its technical and research teams with new hires and promotions. **Liz Boffey** has joined the firm as research director, along with **Sian O'Neil** as marketing executive and **Steve Loton** as designer. **Lisa Williams** and **Kat Watters** were promoted to senior research managers and **Jenny Hilton** to research manager. **Radoslaw Kurowski** and **Agnieszka Tambor-Florek** have joined the technical operations team.


Aasrud

■ **Knut Aasrud** was named CEO at *Norstat*, an Oslo, Norway, research data collection firm. The firm also named **Santa Plivca** as country manager for Latvia.


Plivca

■ **Chris Rife**, vice president at *Healthcare Research and Analytics* (HRA) in Parsippany, N.J., has been appointed to chair the **Pharmaceutical Market Research Group**, while **Jeff Case**, also an HRA vice president, was named to the **Pharmaceutical Business Intelligence and Research Group Affiliate Advisory Board**.

■ **Natalie Gunning** has joined London researcher *Impact Health* as research manager.

■ *The Market Research Society*, London, has appointed **Michelle Goddard** as director of policy and standards.

■ **Lee Naylor**, managing director at the *Leading Edge*, a research firm in Sydney, Australia, has been named chairman. He replaces **Nigel Marsh**, who is leaving the firm.

■ **Melanie Courtright**, executive vice president, global client services at *Research Now*, Plano, Texas, has been appointed as the U.S. ESOMAR representative.

■ *Simpson Carpenter*, a London research company, has hired **Pedro Oliveira** as research manager and **Sophie Mason** as a qualitative operations executive.

■ **Peter Flower** has joined London researcher *Verve* as its community development director along with **Helen Henderson** as research manager, **Kamal Chowdhury** as senior community manager, **Susanna Pecyna** as community manager and **Radu Stan** and **Georgiana Calance** as quality assurance executive. The firm also completed a round of promotions, with **Lawrence Wykes** and **Chris Leo** moving to research manager; **Vasiliki Georgiou** and **Geordie Watson** to qualitative senior research executive; **Eugen Tuchendria** to scripting manager; **Jim Lunn** to quality assurance manager; **Ruxandra Nita** and **Katie Crabb** to community manager and **Su Su Mar-McDonald** to senior data processing executive.

■ Surrey, U.K., sampling and panel management firm *MARSC* has promoted **Allan Shaw** to director of sales and marketing. **Pat Molloy** has joined the board as a non-executive member.

■ Research firm *Cint*, headquartered in Stockholm but with U.S. offices in Atlanta and Los Angeles, has announced multiple promotions, with **Alison Whitmire** being named vice president of sales for the West Coast, **Steve Zawada** and **Andrew Jones** assuming sales director positions and **Katie Gazzuollo** becoming the U.S. supply sales manager. Also, **Matt Brand** and **Jay Steffey** joined the firm as sales director along with **Mark Andrews** and **Michael Patiero** as project managers.

■ Nuremberg, Germany, research company the *GfK Group* has appointed **Babita Earle** head of industry in the consumer experiences business in the U.K. and promoted **Ben Walton** to U.K. head of market opportunities and innovation.

Ben Weedon has joined the company as a director of user experience and **Colin Strong** is leaving his current position with the GfK Group to join London-based research firm Verve.

■ Kansas City, Mo., research firm *Decision Insight* has hired **Doug Robertson** as vice president of client solutions.

■ *Gap Inc.*, San Francisco, has eliminated its global CMO positions for the Gap and Banana Republic brands and will create a head of customer experience. The new position will have responsibilities for e-commerce as well those of the CMO. Other changes at the firm include promotions of **Scott Key** to senior vice president and general manager-customer experience of Gap brand and **Aimee Lapic** in the same role at Banana Republic.

■ *Thoroughbred Research Group*, Louisville, Ky., has hired **Don Ludemann** as director of software engineering.


Ludemann

■ London researcher *Hasson Associates* has hired **Stephanie Richards** as a senior associate and **Alex Giurgiu** as a research consultant.

■ **Ross Gagnon** has been hired as research director for *Forbes Media*, Jersey City, N.J.

■ *BlueConic*, a Boston technology firm, has added **Cory Munchbach** as director of product marketing.

■ In Australia, **Joe Lunn** has joined media agency *Mindshare* as chief strategy officer.

■ **Lee Sang-chul** has been appointed head of strategic marketing for the mobile business at *Samsung Electronics*, South Korea. He will be responsible for the launch of the firm's new Galaxy S device.

■ *PulsePoint*, an advertising technology firm in New York, has added **David Tannenbaum** to its senior leadership team as chief technology officer.

■ **Kirstin Knight** has joined London research company *Kantar Worldpanel* in the newly created role of retail director, to manage the grocery retail division.

■ **Gerard Miodus** has been appointed vice president at Detroit research firm *Morpace*.

■ **Alec Schendzelos** has joined *Marketing Workshop*, an Atlanta research firm, as vice president of client services.

■ Stratford, Conn., technology firm *CyberAlert* has hired **Michelle Hinson** as sales director in the measurement market.

■ *Focus Forward LLC*, a Winston-Salem, N.C., research company, has appointed **Dave Pataki** as executive vice president and **Beth Carey Fuller** as director of qualitative services.

■ *Target Corp.*, Minneapolis, has hired **Mike McNamara** to become chief information officer. McNamara was previously an executive with Tesco.

■ **Sandy Lasky** has joined *Lynx Research Consulting*, Boise, Idaho, as vice president/account executive.

■ *Madison+Main*, a branding and marketing firm in Richmond, Va., has hired **Cassandra Harris** as an account executive and **Madalyn Parr** as a marketing administrator.

■ *Millward Brown*, New York, has

promoted **Chirantan Ray** to the role of managing director in its Shanghai office and appointed **Robert Fuchs** as head of media and digital for greater China and North Asia. He will also be based in Shanghai.

■ **Jennifer Sproul** has joined *Opinion Matters*, a London research firm, in the newly created position of head of client services.

■ **Richard Abraham** has accepted the position of director - social and government at the Sydney, Australia, *TNS* office.

■ **Simon Marquis**, chairman of the *National Readership Survey*, London, plans to leave his position at the end of the year.

■ **Steve Looney** has joined *Opinium Research*, London, as head of consumer goods research.

■ The Brisbane, Australia, *Ipsos* office gained three new executives with the hirings of **Kathy Benson** as strategy and research director and **Kylie Brosnan** as director of Ipsos public affairs and the transfer of **Anna Eden** from the Perth office for the role of senior client services director.

■ Sydney, Australia, marketing firm *Beyond Analysis* has appointed **Jeff Sanders** as CEO.

■ *Razor Research*, London, has hired **Tom O'Dwyer** and **Lucie Holliday** as director.

■ **Paul Gold** has joined New York software provider *Telmar* as vice president, strategic data operations.

■ At the *Interactive Advertising Bureau* (IAB) in New York, **Michael Theodore** has been promoted to senior vice president, IAB, and general manager, IAB Education Foundation.

■ **Roy Patel** has joined *Market Cube*, an online sample and research operations company in Charleston, S.C., as European regional head.

■ *TNS UK*, London, has hired **Sarah Patterson** as strategic planning director.

■ **Jason Jacobson** has been appointed research director at *Koski Research*, San Francisco.

■ London research firm *Allegra Insights* has hired **Simon Mogford** as head of business development.

■ **Adam Warner** has joined *Keen as Mustard Marketing*, London, as communications manager.

■ *Ipsos Loyalty*, New York, has appointed **John Carroll III** as the leader of its new customer experience practice within the U.S.

■ New York social news and Internet firm *BuzzFeed* has hired **Lee Brown** as its chief revenue officer.

■ London researcher *YouGov* has tapped **Alex McIntosh** as CEO of its U.K. office. He had held the position on an interim basis since **Tim Britton**'s exit. He will continue serving as chief strategy officer in addition to his new role.

■ London mystery shopping firm *React Surveys* has promoted **Nicky Barrell** to managing director.

■ **Peter Moloney** was named CEO of *Loyalty Builders*, a Boston customer analytics firm. **Mark Klein**, the previous CEO, will remain as chairman and chief technical officer.

■ **Dave Perry** has joined *Acorn Marketing and Research Consultants*, Tokyo, as a senior research manager.

■ **Susan Hwang Nanzer** has joined *Precision Sample*, Denver, as chief revenue officer.

■ *Babcox Media*, Akron, Ohio, has hired **Kent Camino** as manager of market research.

■ *Basis Research*, London, has appointed **Sarah Jenkins** as senior director, overseeing its media, content and technology areas.

■ *MarketVision Research*, Cincinnati, announced multiple hirings, including **Emily Reynolds** as research assistant/graphic designer, **Quinn Smith** as research assistant on the information services team, **Daniel Garleb** as research assistant on the marketing services team and **David Gitonga** as senior research associate on the Web development team. Also, **Kelsey Schmeckpeper** and **Nicole Lemen** joined the firm as research assistant on the quantitative client services team.

■ Dallas software firm *RealPage Inc.*, has hired **Daryl Rolley** as chief customer officer.

■ Seattle mobile marketing analytics startup *Tune* has named **Steve McQuade** as its vice president of engineering.

■ **Sarah Jenkins** has joined *Basis Research*, London, as senior director, with responsibilities for the company's media, content and technology areas.

■ *DunnhumbyUSA* has made six promotions in its Cincinnati office, including **Molly Pearson** as client lead, **Chelsea Oliver** as analyst, **Neil Pharris** as analysis manager, **Tim Stoll** as senior business analyst, **Katie Vogt** as senior client lead and **Sarayu Sarangan** as senior data developer.

Research Industry News

News notes

■ The U.K. governmental Competition and Markets Authority (CMA) has contracted with Cologne, Germany, consulting firm **Detecon** and **Analysys Mason**, a London telecommunications firm, to examine the commercial use of consumer data by auto insurance firms, retailers and game app providers. The study will include personal data and aggregated, anonymized metadata. "The researchers will examine available evidence and contact businesses operating in the sectors, as well as third parties, to understand how and why they are collecting and using consumers' data," the CMA said.

■ **U.S. News & World Report**, Washington, D.C., released its list of the best jobs of 2015, revealing "market research analyst" as the 14th best profession overall and the top profession in the business jobs category. Other categories included health care jobs, creative jobs and STEM jobs. The high rankings were due in part to the U.S. Bureau of Labor Statistics predicting a 31.6 percent employment increase for market research analysts between 2012 and 2022.

■ TV network **Nickelodeon** has completed a research project to measure children's real-time responses to advertising. Partnering with **Momentum Research**, Durham, N.C., Nickelodeon used facial coding to measure emotions and engagement following each advertisement. Alison York, Nickelodeon head of insight, described the usual in-home setting as having one large screen while multiple family members had handheld devices but said that current predictions of multi-screening did not hold with all the children. "It depends on the developmental stage as to whether they are capable of multi-screening," she said, adding that only around age 10 do they begin to multi-screen. Earlier, they are either unable to do so or are really moving between the handheld device and the large TV. The Nickelodeon research found that in 50 percent of the time kids are watching TV, that is all they are doing.

■ **Research for Good** (RFG), Seattle, Wash., generated $122,748 in donations for the **World Food Program** and **Action Against Hunger** in 2014. RFG makes a donation for every survey completed by its participants.

■ **Ford** has opened its new Research and Innovation Center, located in the Silicon Valley and intended to be the largest automotive center in the area. The center will expand its current team of engineers to include 125 software, IT and user-experience specialists, along with business, development and marketing executives. The company plans to collaborate with outside engineers and to connect with local universities. Dragos Maciuca, a former Apple executive, will supervise the center.

■ A three-year investigation by the U.K. Information Commissioner's Office (ICO) has led to **Google's** agreement to update its U.K. privacy policy, ensuring that the policy and its account settings feature are easier to find and providing information on who can collect cookie-like identifiers and the reasons for their collection. Google has until June 30 to implement the changes.

quirks.com/articles/2015/20150413

Acquisitions/transactions

■ Denver analytics firm **IHS** has acquired **Rushmore Reviews**, Aberdeen, Scotland, which provides data for the oil and gas industry. Terms of the deal were not disclosed.

■ Portland, Ore., researcher **Rentrak** has sold its Pay Per Transaction (PPT) packaged media rental business to **Vobile**, a San Francisco technology firm, for a total price of $7 million, comprised of $1 million in cash, a $1 million note due in six months and Vobile preferred stock with a $5 million liquidation preference. Vobile plans to hire all Rentrak PPT employees to continue running the business and will rent space in Rentrak's Portland office.

■ **Wealth-X**, a Singapore research firm, has acquired **Ledbury Research**. Ledbury will be re-branded with the Wealth-X name and will continue to operate from its current London offices.

■ **Microsoft** has acquired **Revolution Analytics**, a Mountain View, Calif., specialist in software and services for the R programming language for statistical computing and analytics. Financial terms were not revealed.

■ **Symphony Technology Group**, a private equity firm, is selling its mobile industry software and analytics services firm, Symphony Teleca, to **Harman International Incorporated**, an audio equipment manufacturer in Stamford, Conn., for an initial $780 million. Symphony Teleca CEO Sanjay Dhawan will join Harman and lead the new business division.

■ The Indian subsidiary of **Asian Majestic Market Research Support Services** has purchased a majority stake in **EMTEE Research and Consultants**, New Delhi.

■ In San Francisco, social network **Pinterest** has acquired **Kosei**, a Palo Alto, Calif., technology company. The Kosei platform analyzes customers' browsing and purchasing history to predict future purchases. Co-founders Lance Reidel and Jure Leskovec and most of the Kosei team will join the Pinterest staff.

■ **Apple** has acquired **Semetric**, a London software firm with the Musicmetric tool which allows music industry artists and marketers to track their sales, downloads and social media metrics.

■ **Tradedoubler**, Stockholm, has acquired **Adnologies**, a provider of ad retargeting technology based in Hamburg, Germany. Terms of the deal were not disclosed.

■ Paris-based research and software firm **Bilendi** is set to acquire **M3 Research**, Funen, Denmark, for an undisclosed sum. M3 Research's team of 26 employees will join Bilendi, and founders Mik S. Oddershede and Steen Agerskov and CEO Helle Oddershede will continue in their roles.

Alliances/strategic partnerships

■ **Invoke Solutions**, Boston, has merged with **Academic Management Systems**, Buffalo, N.Y. The two companies will continue to operate independently but will share software development, engineering, back office resources and financial management.

■ In London, **Quidco**, an online cashback site, is partnering with Stockholm software firm **Cint** to add the Quidco panel of 70,000 members to Cint's OpinionHub platform. Quidco, with more than 4 million U.K. members and 4,200 retail partners, maintains transactional data on its panelists which can be used to profile audiences by online buying habits or to attach transactional data to survey data.

■ **The Platt Retail Institute**, a Hinsdale, Ill., research firm, has joined with the Integrated Marketing Communications department of **Northwestern University**, Evanston, Ill., to create the Retail Analytics Council. Steven Keith Platt has been named the Council's research director.

■ **QEP Marketing Clinic**, a Chicago researcher, and **Creando Associates**, a New Delhi research firm, are partnering to market QEP Marketing Clinic's proprietary methodology in India and to assist in its expansion in Asia. QEP, in turn, will promote Creando Associates to global clients interested in the Indian and Asian markets.

■ New York researcher **Nielsen** has partnered with Vancouver, Canada, software designer **ResponseTek** to create the Nielsen Listening Platform, which measures and analyzes customer feedback as it is received. The tool can provide performance metrics and benchmarking against competitors, as well as send automated alerts for any necessary corrective actions.

■ **Birdzi**, a Iselin, N.J., technology firm, has partnered with **ProLogic Retail Services**, a technology company in Chandigarh, India, to allow retailers to deliver personalized offers to shoppers at the checkout. The partnership will combine the Birdzi platform data collection with the ProLogic CRM software which helps retailers identify top shoppers and develop targeted offers.

■ **Starcom MediaVest** (SMG), a Chicago marketing firm, and **FourthWall Media**, a Washington, D.C., marketer, have formed a partnership providing SMG access to FourthWall's anonymous, non-aggregated viewership data. SMG will integrate the FourthWall Media dataset with its TARDIIS planning and buying platform.

■ **BDRC**, a London research group, has entered into a joint venture with **Fusion Analytics**, a research firm based in Washington, D.C., to launch BDRC Americas. Fusion will merge into the new company and Matthew Petrie, founder and president of Fusion, and Fusion director Liz Healy will assume similar positions. BDRC will be the majority stockholder.

New accounts/projects

■ The Romanian television industry committee, **ARMA** (Asociatia Romana pentru Masurarea Audientelor), has extended its contract with London research firm **Kantar Media** until the end of 2019.

■ New York media services company **Horizon Media** will utilize the full suite of ratings services of Portland, Ore., researcher **Rentrak**. Separately, the **Tennis Channel**, Santa Monica, Calif., has agreed to use Rentrak's TV measurement services.

New companies/new divisions/ relocations/expansions

■ **Afghanistan Monitoring and Research** opened in Kabul on January 1, 2015. It is the first company in Afghanistan to conduct daily television audience research and planned to provide gross rating points and target rating points for television viewership by the end of March.

■ In Los Angeles, research firm **uSamp** has re-branded to **Instantly Inc.**, with its products and services acquiring the Instantly name, shown on the new instant.ly.com Web site. "Changing our name to Instantly allows us to directly connect our sample business to our insights platform and expand both business units together," said Alan Gould, CEO. Separately, Instantly has opened a New York office.

■ **Millward Brown**, New York, has established a new division, **Millward Brown Analytics**, to offer combined research, analytics and brand knowledge. The business will be staffed with analysts and researchers from its marketing science and MaPS (Marketing and Planning Systems) teams. Chris Petranto, managing partner at MaPS, and Chris Murphy, executive vice president and managing partner of Millward Brown Client Solutions and Analytics, will jointly lead the new business.

■ In London, Mehmet Xhambazi and Abdi Saïd have launched **Red Dot Research**, which will specialize in online research and panel provision, as well as public relations research services.

■ **The Havas Creative Group**, Paris, is merging its data agencies Havas EHS and Havas Discovery into a new unit, **Helia**. It will be led by Havas EHS Group CEO Tash Whitmey and COO Matt Fanshawe and Havas Worldwide Chicago Group President Paul Marobella. The EHS and Discovery agencies provided direct marketing, loyalty, CRM, e-commerce, demand generation, data intelligence and analytics programs.

■ **Dapresy**, a Stockholm-based data reporting technology specialist, has opened new offices in Germany and Australasia.

■ London research firm **Mintel** has opened a new office in Munich which will serve as the company's hub for the Germany, Austria, Switzerland and central eastern Europe region. Frank Weibelzahl will lead the office.

■ Ian Murray and Catherine Heaney have opened a new agency, **house51**, which offers brand, communications and social research through a group of senior consultants. Designed to be a "research collective," they plan to integrate market research with psychology, behavioral economics and neuro-scientific approaches. They have offices in London and Glasgow.

■ Turkish social media specialist **adMingle** has opened an office in Singapore, to be led by Oz Aksugur. AdMingle calculates the influence and reach of social media by attaching values for each tweeting or posting activity and then measuring its followers, retweets or favorites.

■ **Tractica**, an industry analyst firm, has opened in Boulder, Colo., and will provide research reports and advisory services on user interface technologies, wearable devices and automation and robotics.

■ **Metrix Consulting**, Perth, Australia, has opened an office in Melbourne, to be led by Asher Hunter.

■ Leeds, U.K.-headquartered youth research and marketing strategist **Dubit** has opened an office in Melbourne, Australia. It will be headed by Adam Schoff as vice president of digital strategy for Asia Pacific.

Research company earnings/ financial news

■ London marketing services firm **WPP** plans to take a 15 to 20 percent stake in **comScore**, a Reston, Va., research firm. ComScore will issue 4.45 percent in shares in exchange for both partnership benefits and the acquisition of European Internet audience businesses in some European markets. WPP will purchase up to a 15 percent share of comScore with an offer price of $46.13.

■ **Study Hall Research** reported its CY 2014 revenues increasing 28.7 percent and its client contracts up 32.1 percent over CY 2013 figures. The firm has moved to new and larger corporate headquarters in South Tampa, Fla.

■ **Research Now Group**, Plano, Texas, has entered into an agreement with Court Square Capital Partners, a private equity firm. The current management team at Research Now will remain. No financial terms were revealed.

■ **The University of Cyprus** has secured continued funding of more than €1.5m over the next six years for its Economic Research Centre. The Centre conducts monthly reviews for the European Union survey program, including studies of the service, retail trade, manufacturers and consumer sectors.

■ San Mateo marketing software firm **Beckon** has closed a $13 million round of Series B funding, which will be used to continue development of its platform.

■ In Bordeaux, France, researcher **Strategir** has invested an undisclosed sum in Paris consumer research agency **WSA**, which will become Strategir-WSA. The new company will be 70 percent owned by Strategir and 30 percent by the current managers of WSA, Pascal Bluteau, Dominique Suire and Jean-Pierre Michel.

■ Nuremberg, Germany, research company the **GfK Group** reported its sales figures for the 2014 financial year fell by 2.9 percent to €1.451 billion, with organic sales down by 2.1 percent. Currency effects accounted for a sales reduction of 0.9 percent.

■ Portland, Ore., research firm **Rentrak** reported revenue of $26.9 million for the third quarter of FY 2015, an increase of 38 percent over the same period in the previous year. The TV Everywhere business accounted for $14.8 million. Group operating expenses were $19.7 million, an increase from $14.5 million in the third quarter of FY 2014.

■ London-based **Kadence**

International reported a 14 percent increase in its gross global half-year revenues, taking in $16 million. The increase was driven by growth in its U.S. and Indian operations.

■ **Gartner**, Stamford, Conn., reported a Q4 revenue of $584 million, a 12 percent increase over Q4 2013. The company's net income for the 2014 quarter was $59.1 million, a decrease of 4 percent over Q4 2013 which was attributed to acquisition-related charges and a higher tax rate.

■ **Forrester Research**, Cambridge, Mass., reported a 4Q 2014 increase in research revenues of five percent, reaching $53.8 million. For the full year ending December 31, research revenues were $207.5 million compared with the previous year total of $202.8 million. Net income was $5.7 million compared to $4.0 million in 2013.

■ In New York, **Nielsen** reported Q4 revenue of $1.6 billion, an increase of 1.4 percent. Eliminating the effect of its Arbitron and Harris Interactive acquisitions reduced the increase to just 0.1 percent, still enough to continue its pattern of revenue growth over 34 consecutive quarters. For the full year which ended December 31, 2014, group revenues rose 10.3 percent to $6.3 billion. Buy revenues were up 3.4 percent to $3.5 billion and Watch revenues up 20.4 percent to $2.8 billion.

■ Reston, Va.-based **comScore** reported a 19 percent increase in its 4Q 2014 revenue to $89.1 million on a pro forma basis. GAAP net loss was $2.7 million. Full year 2014 adjusted EBITDA increased 24 percent to $75.9 million from the previous year.

■ Bloomfield Hills, Mich., researcher **RDA Group** announced 2014 revenue of $23.8 million, up 14 percent year-on-year and up 60 percent over the last five years.

■ **IMS Health**, Danbury, Conn., released its financial results for the quarter and year ending December 31, 2014, showing a 6.2 percent increase in revenue to $678 million in Q4 and 5.9 percent increase to $2,641 million for the full year on a constant currency basis. IMS said technology services revenue grew 13.6 percent while information revenue rose by 0.8 percent at constant currencies.

■ **Meetrics**, a Berlin-based ad measurement firm, obtained a seven-figure investment in its second financing round.

■ At **HealthStream**, a Nashville, Tenn., health care researcher, revenues for 4Q 2014 increased 22 percent from 4Q 2013 to $45.3 million and full-year revenues were up 29 percent from 2013 to $170.7 million.

■ **The Enero Group**, Sydney, Australia, parent company of Australian research firms the Leading Edge and Jigsaw Research, reported net revenue down 9 percent to $56.2 million in Australian dollars ($43.69 million U.S.) for the half year ending December 31, 2014.

CALENDAR OF EVENTS

••• can't-miss activities

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.

IRI will hold its annual summit on **April 20-22** at the J.W. Marriott in **Austin, Texas**. Visit www.iriworldwide.com.

The Cleveland AMA Market Research Conference will be held on **April 23** at the Doubletree Hotel in **Cleveland**. Visit https://2015clevelandama-mrc.eventbrite.com.

Alumni of the Master of Science in Marketing Research program at the University of Texas at Arlington (UTA) will hold their annual conference on **April 23** at **UTA**. Visit http://msmralumni.org/msmr-alumni-market-research-conference/general-information/.

The Hub will hold its conference, themed "Hub Live: Retail Experience Symposium," on **April 23** at the Helen Mills Theater in **New York**. Visit http://atnd.it/19829-1.

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.

The 2015 Canadian Pharma Market Research Conference will be held on **April 28-29** in **Toronto.** Visit http://pharmamarketresearchconference.com.

The International Quality and Productivity Center will hold an event titled, "Customer Experience Transformation: Gambling," on **April 28-30** in **London**. Visit http://www.customerexperiencegambling.com/.

Innovation Enterprise will hold the Chief Innovation Summit, themed "Nurturing Culture, Accelerating Change," on **April 29-30** in **London**. Visit http://theinnovationenterprise.com/summits/calendar.

Innovation Enterprise will hold a conference, themed "Simplify Digital Analytics," on **April 29-30** in **San Francisco.** Visit http://theinnovationenterprise.com/summits/social-media-web-analytics-innovation-san-francisco.

The Next Generation Retail Summit 2015 will be held on **May 4-6** at the Omni Colonnade in **San Antonio, Texas.** Visit http://www.gdsinternational.com/events/ngretail/us/.

The Customer Experience Professionals Association will hold its members meeting on **May 5-6** at the Hotel del Coronado, **Coronado, Calif**. Visit www.cxpa.org/events/event_details.aspid=447041&group.

Adaptive Path will hold a four-day workshop on **May 5-8** in **Copenhagen, Denmark.** Visit http://www.adaptivepath.com/events-training/.

The Yale School of Management and the Yale Center for Customer Insights will hold a conference, themed "The 2015 Customer Insights Conference," on **May 8-9** in **New Haven, Conn.** Visit http://som.yale.edu/2015-customer-insights-conference.

Worldwide Business Research will hold its conference, "eTail Canada," on **May 11-13** at the Hyatt Regency Toronto in **Toronto**. Visit http://etailca.com/.

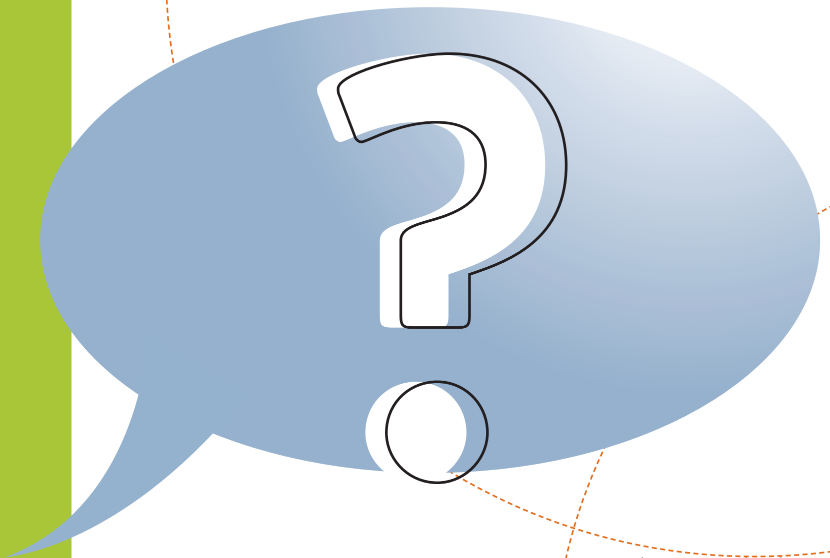
Red 7 Media's Experiential Marketing Summit 2015 will be held on **May 11-13** at the Marriott Marquis in **San Francisco**. Visit http://emsummit.eventmarketer.com/.

Marcus Evans will hold its PharmaMarketing Summit 2015 on **May 11-13** at the Eau Palm Beach Resort and Spa, **Palm Beach, Fla.** Visit http://www.pharmamarketingsummit.com.

The Society of Competitive Intelligence Professionals will hold its 30th anniversary international conference and exhibition on **May 11-14** in **Atlanta, Ga.** Visit http://www.scip.org.

Global Insight Conferences will hold its Social Media Results Conference, themed "Future Strategies," on **May 13** at the **Museum of London Docklands, London**. Visit http://www.socialmediaresultsconference.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.



Questions you should ask when selecting a telephone facility

The basics

Is the facility able to scale appropriately between small and large projects? What kind of contact services are provided? Do you have inbound and outbound calling capabilities? Do you provide additional contact capabilities (e.g., Web, mail, e-mail, etc.) for multimode research? Do you have international/multilingual reach?

The staff

What are the required qualifications for interviewers? How are interviewers trained and what ongoing training is provided? What is the supervisor-to-interviewer ratio? What percentage of interviewer completes is monitored?

Available technology

Does the telephone research facility have clear remote-monitoring capabilities to adequately monitor projects as they first go into the field? What ability will I have to do live monitoring of active interviews? Can you record interviews? If so, how would I receive the recordings? How do you handle states where two-party consent is required? Do you have cost-saving technologies like interactive voice response and predictive dialing? Do you provide online real-time reporting capabilities on survey data? Does the CATI software ensure that no data or sample is stored on the local interviewer computer in the call center? Does the CATI software provide separation of data for each project dialed? Does each project have its own database?

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Standard operating procedures

How are interviewers incentivized? What times do you normally dial business and consumer studies? How do you oversee interviewer dialings/completes? How are cell phone numbers handled, if at all?

Quality control

What are your quality-control procedures? Is there a secure on-site server? If so, how often is it backed up? How do you keep track of monitorings and validations? What percentage of phone calls is actively monitored for quality? How is the quality of a phone call measured and reported? What metrics are used? Do interviewers read verbatim or are they allowed to paraphrase if a respondent does not understand the question?

Your deliverables

During and after the telephone interviews, what are the deliverables? What time are my reports ready each day and how do I receive them?

Special thanks to Thoroughbred Research Group, Louisville, Ky., and DataPrompt International, Chicago, for providing input on the questions.

2015 Telephone Facilities Directory

The 2015 Directory of Telephone Interviewing Facilities was compiled by sending listing forms to firms we identified as having permanent telephone interviewing facilities. The online version of this directory lists nearly 700 firms. The 80 firms included in this print version are those that purchased listing enhancements. In addition to the company's vital information, we've included a line of codes showing the number of interviewing stations, the number of stations that use CATI and the number of stations that can be monitored on-site and off-site.

A searchable version of this directory is available at www.quirks.com

Codes - (e.g. 25-10-25-10)

1. STATIONS - No. of interviewing stations at this location
2. CATI - No. of stations using computer-aided interviewing
3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES- No. of stations which can be monitored off-premises

Arizona

Behavior Research Center
Phoenix, AZ
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www.brc-research.com
Earl de Berge Research Director
32-32-32-32

BRC Field & Focus Services has 45 years of experience providing a full spectrum of high-quality telephone data collection services throughout the U.S. and Latin America. BRC has predictive dialing, 32 CATI stations with ACS WinQuery 11.0 (fully backwards compatible), remote monitoring and 40% of our carefully-trained interviewers are skilled in both English and Spanish. Specialities include Latino, executive, B2B, medically-at-risk populations, Native Americans, low-incidence. Network of face-to-face interviews across the western U.S. Expert professional design, processing, analysis services also available.

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www.torinc.net
Brad Larson VP, Marketing
60-60-60-60

Arkansas

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C&C is the global leader in market research and the largest data collection company in the U.S., with 47 locations nationwide. C&C is the No. 1 choice for your market research project. C&C - offering our clients every demographic diversity across the United States.
(See advertisement p. 45)

California

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San Diego, CA
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info@diresearch.com
www.diresearch.com
David Phife President
350-350-350-350

Directions In Research was founded in 1985 and is an established firm offering both quantitative and qualitative services utilizing the latest technology and data collection methods. We have earned a well-deserved reputation for providing the highest-quality data while maintaining a superior level of client service. Our data collection capabilities include CATI interviewing, Web surveys, IVR and Recruit-to-Web. DIR's headquarters is located in San Diego with call center locations in Grand Rapids, Mich.; Corpus Christi, Texas; and San Jose, Costa Rica.

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As a specialty market research firm, infoAnalytica provides a full range of telephone data collection services across the globe. Our interviewers are trained to elicit accurate responses from busy respondents, and also to ensure maximum engagement from respondents during the administration of surveys and interviews. We build extensive rigor into the process of research design, sample selection and questionnaire/interview development to ensure data is captured accurately and leads to actionable insights. infoAnalytica's research expertise spans across various industry verticals and our clients include global players such as Intel, PayPal, Microsoft, eBay, and several more. For more information, please visit infoanalytica.com

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ISA is one of the largest marketing research data collection companies in the U.S. with 325 CATI positions. ISA is known as the industry leader in multicultural data collection, having conducted interviews in 67 languages to date. Online and Mobile interviewing with our online sample solution, SoapBoxSample, leverages our proprietary panel with resources such as opt-in panel, routing techniques and live sample to offer access to millions of respondents. Through our Q-insights division we conduct face-to-face intercept interviews using mobile devices for car clinics, in-person and executive interviewing nationally. Q-insights has a focus group facility in the Los Angeles area and nationwide recruiting capabilities. ISA also specializes in customer satisfaction programs, utilizing multimode data collection including CATI, IVR and online.

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Barbara Ankersmit President
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QMark's mission is to find the answers to the questions that often underlie expensive decisions. From the public's perceptions of a client to the motivating factors for a particular audience, QMark provides decision makers with sound information so that they may proceed in an educated, effective manner. We are a full-service market research company that also provides field service and/or data entry and tabulation services for U.S. mainland clients. QMark's in-house calling center is equipped with a bank of 30 telephone stations equipped with CATI software (Sawtooth Ci3 and Sensus Web/telephone). Our brand-new focus group facility seats 13 in the client room with tiered theater-style seating.

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Brad Larson
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Thoroughbred Research Group is a full-service research firm with over 35 years of experience. Our consultative approach to each engagement ensures the most appropriate methodology is employed, the correct population is surveyed and that the results are meaningful. Services include questionnaire design, telephone interviews, programming and hosting Web surveys, traditional and online focus groups/IDIs, advanced analytics and reporting.

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cspara@mdmarketingsource.com
www.mdmarketingsource.com
Christopher Spara CEO
40-40-40-40

Maryland Marketing Source Inc., established in November 1986, is a full-service market research company specializing in qualitative and quantitative custom-designed research. We are a hands-on organization that believes in high-quality, actionable and reliable research results. We don't believe in cookie-cutter research; our capabilities are multifaceted and we tailor all of our projects to meet the specific needs of our clients. We maintain a state-of-the-art CATI facility, have established interviewer training procedures and are certified as MBE by State of Maryland, Baltimore City and other municipalities. Be it for assistance with part or your entire project, we are here to help.

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www.issans.com
Peter McGuiness President
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Ph. 757-456-1100 (corporate) or 800-23-ISSUE
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Peter McGuinness President
66-66-66-66
(See advertisement p. 81)

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3. ON-SITE - No. of stations which can be monitored on-site
4. OFF-PREMISES- No. of stations which can be monitored off-premises

Minnesota

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(See advertisement p. 79)

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New York

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Adelman Research Group provides data acquisition, analytics and insights for multi-mode and hybrid methodologies. ARG is regarded as a reliable source for obtaining data provided by experienced, quality-driven research professionals. ARG specializes in customer satisfaction, health care, market assessment, financial, industrial and consumer goods research. Experienced programmers and analysts provide impeccable data, real-time dashboard reporting, report ready tables and charts. Extensive experience and outstanding staff provide the elements required for an exceptional research partner.

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IC International is a world leader in data collection and global field management services. Our experienced and dedicated staff provides marketing research services for clients both in the U.S. and internationally. We offer a full suite of qualitative and quantitative data collection services and deliver quality actionable data, which allows our clients to meet their research goals. Our consultative approach coupled with the experience of operating since 1983, stringent quality controls and customer-centric commitment is why clients work with IC International.

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160-160-160-160

Mktg., Inc., with 31 years of data collection expertise, has always had a reputation for quality data collection. Our staff has an average tenure of over 25 years in the market research industry. Our CATI facility has been in continuous operation since opening in 1979 and all of our 160 interviewing stations have predictive dialer capability. The Sample Source Auditors division provides unique online sample quality measures and solutions. We offer the quality control metrics needed to insure a consistent data output and give researchers a stable sampling frame.

SIS International Research, Inc.
New York, NY
Ph. 212-505-6805
research@sisinternational.com
www.sisinternational.com
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(See advertisement p. 82)

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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 30

Speaking directly from the trenches of industrial market research, I suggest that the differences between B2C and B2B are as stark as the differences in a ballroom and a bayou.

page 40

If you don't use a conjoint-type approach to investigate product design questions involving product-feature trade-offs, you have to fall back on the use of direct questioning methods

page 46

Unfortunately, many organizations see their partners as only receiving communication from one channel: themselves.

page 51

As you might expect, translation is always a challenge. But don't stop at finding a quality translator with good references.

page 56

To be useful to researchers, a vehicle classification must accommodate all six forms of shopping behavior and all five site sources.

Enjoy Cocktails with Quirk's at InsighTech in San Francisco

In conjunction with the InsighTech event, Quirk's is hosting a cocktail party on May 5 at the Karl Strauss Brewery in San Francisco. Whether you are attending InsighTech or are just in town, you're invited to join Quirk's for this casual networking event! Enjoy the brewery's award-winning Red Trolley Ale as you mingle and network with other Quirk's subscribers and supporters. Free drinks and appetizers will be provided.

Space is limited, so please register in advance at www.quirks.com/cocktails.

Coming in the May Quirk's

••• qualitative research

Quester's Garrett McGuire offers four things marketing researchers can learn from the popular Humans of New York photo blog.

••• qualitative research

Researcher Tanya Krim explores what she discovered about the value of empathy in the retail setting from an impromptu day out with a friend battling cancer.

••• the business of research

GfK's Holly Heline Jarrell and Bitsy Bentley explore how marketing researchers can use data curation and data integration can empower decision makers.


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