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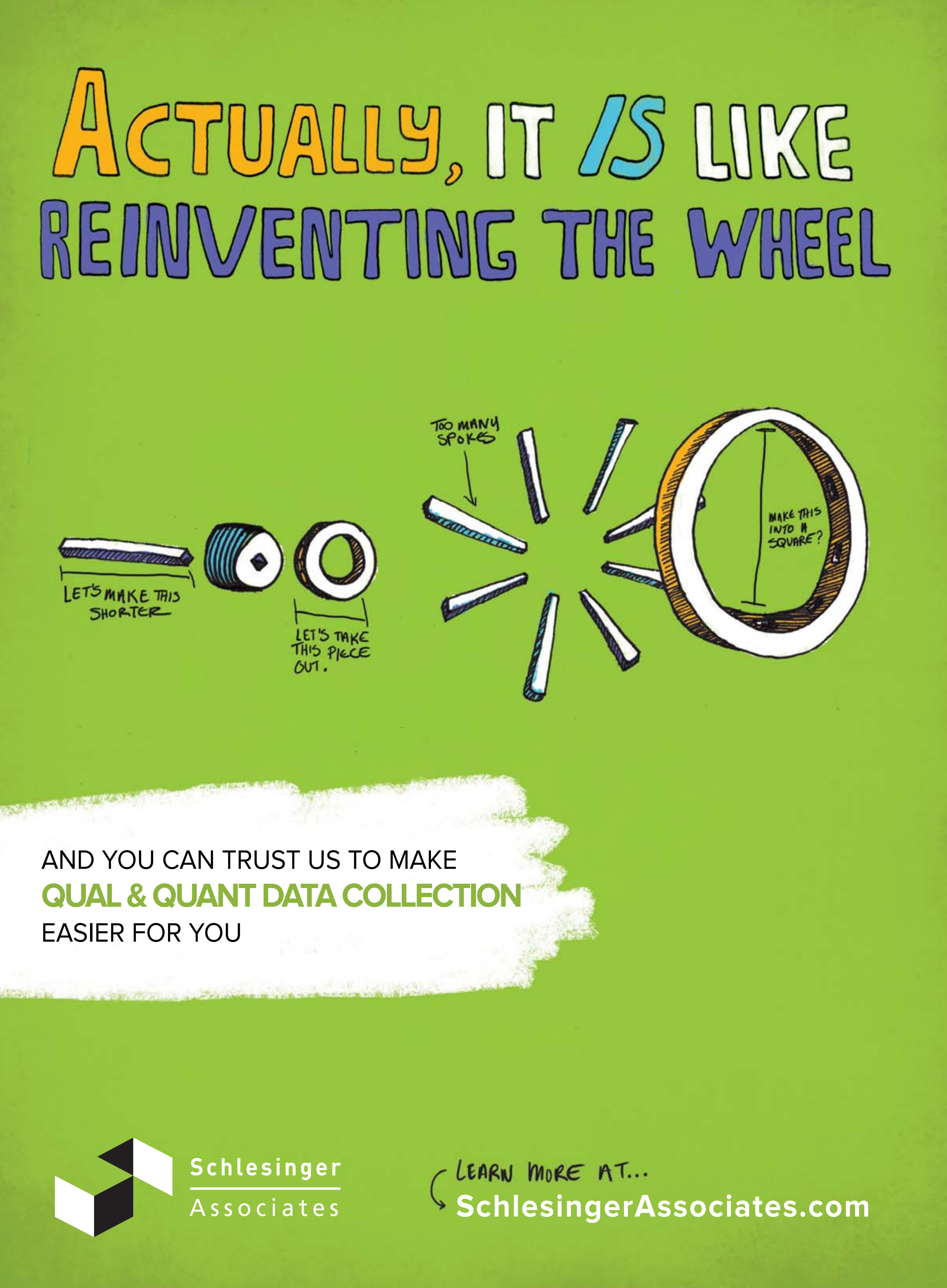
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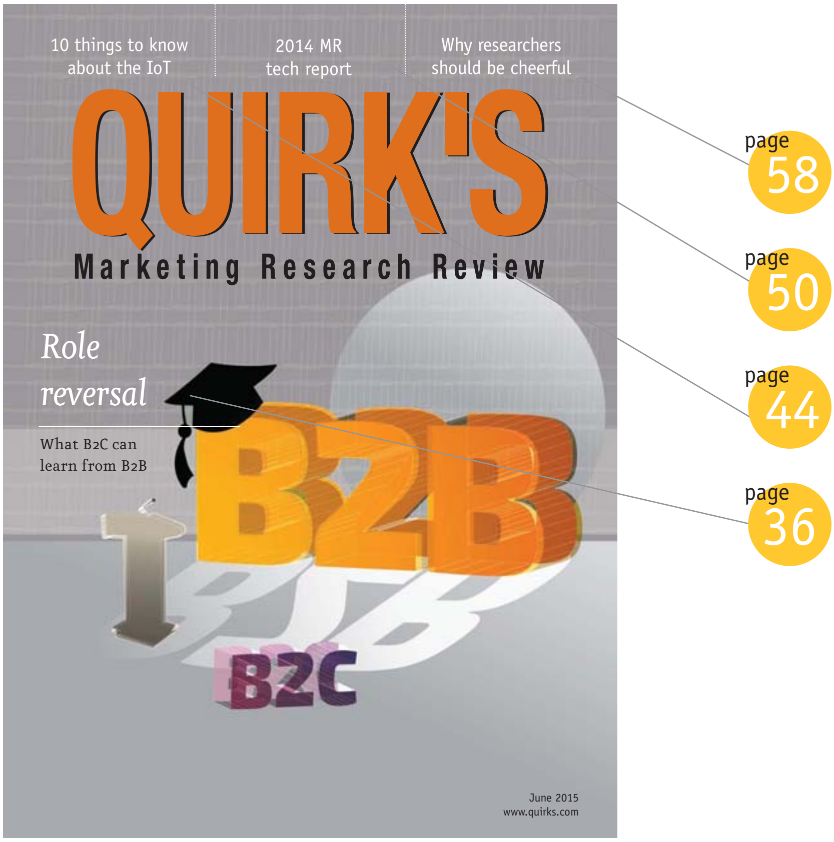

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ON THE COVER

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DEPARTMENTS

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

Publisher • Steve Quirk
steve@quirks.com | x202

Editor • Joseph Rydholm
joe@quirks.com | x204

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

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

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

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

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

Sales • Lance Streff
lance@quirks.com | x211

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••• employer tools

Looking to hire?

Try before you buy! Hiring interns may be one of the best choices you can make.

University of Texas Arlington MSMR students follow a curriculum that arms them with strong analytic and writing skills in all areas. Many of the students have had positions in related industries, and the alumni are currently employed in senior research positions at Fortune 500 companies. UTA is looking for companies to provide semester-long paid internships for these students.

Please contact Dr. Robert Rogers, MSMR program director, at rrogers@uta.edu to learn more.

// E-newsworthy

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7 women who are shaping the future of MR
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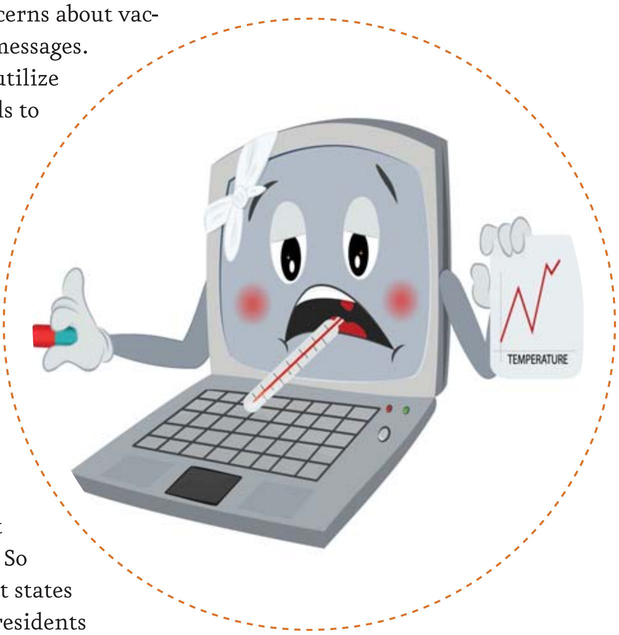
••• public health research

Scientists use flu-related tweets to complement survey data

Tweets from individuals who did – or didn't – choose to receive flu vaccinations this past year are being analyzed to explore reasons behind these choices and how attitudes differ among groups. Scientists from George Washington University, Johns Hopkins University and the University of Georgia have identified millions of tweets mentioning concerns about vaccines and geolocated the messages. The researchers will also utilize traditional survey methods to reach people who refused flu vaccines. "Survey data tend to draw from older, white, rural households, whereas younger, urban minorities are overrepresented on Twitter. These two techniques complement each other perfectly," said Karen Hilyard, assistant professor in the College of Public Health at the University of Georgia. So far, their results show that states with a higher number of residents who received the flu shot had a higher number of vaccine-positive messages on Twitter.



Mark Dredze, assistant research professor in the Department of Computer Science at Johns Hopkins University, will develop new computer algorithms to support the team's research. "We hope to gain insights into people's reasoning about vaccines by automatically processing millions of Twitter messages," Dredze said.

"People really do tweet about everything and conversations about vaccines are no exception," said David Broniatowski, assistant professor in the School of Engineering and Applied Science at the George Washington University, who will co-lead the study on vaccine refusal patterns. "Parents and patients freely share their fears and concerns about vaccines. While it typically takes years to collect meaningful information about why people refuse vaccines, using surveys and searching Twitter brings immediate results."

The research will be used by health officials to plan better responses to the next outbreak.

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••• automotive research

Social networks are driving car sales

The traditional automotive advertising model may be left behind as car buyers are turning to peer reviews and social media to learn about car brands and models, according to research from Crowdtap, a New York marketing firm. In a February 2015 poll of 500 community members who were looking to purchase a vehicle in the next year or had already bought a vehicle in the past year, Crowdtap found that 80 percent said they were more likely to turn to their social network for car-buying advice than to car salesmen and 68 percent said they had purchased a car they found on social media. Almost all of the respondents (95 percent) say that they would talk about car models they like on social media. The most influential car recommendations came from friends or family (36 percent), followed by online review sites (19 percent) and social media (16 percent). "Media-empowered consumers – who increasingly rely on the opinions of their peers to inform buying decisions – are flipping the automotive advertising model on its head," said Matthew Scott, senior vice president of strategy and business development at Crowdtap. "Auto brands that are able to steer the power of peer endorsements and social sharing will find success in marketing's people-powered future."

By Joseph Rydholm, Quirk's Editor

MR firms having good luck finding good people

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Joe Rydholm can be reached at joe@quirks.com

As part of a Quirk's-hosted and Deltek-sponsored Webinar last month, I moderated a conversation with execs from three research firms that explored some of the issues they're facing these days in running their companies. Our panelists were Jim Bryson, CEO of 20/20 Research, Nashville, Tenn.; Duncan Lawrence, CEO and president of Morpace, Farmington Hills, Mich.; and Scott Young, president of Perception Research Services, Teaneck, N.J.

My questions for the panelists clustered around four topic areas: talent and organizational culture; business efficiencies and profitability; technology; and winning new business.

In one of the three polls we tossed out to the audience, we asked about which attribute is most important for new MR hires to possess. At 59 percent, "can tell a compelling story with data" was the clear winner, followed by "emotional intelligence (truly understands people)" at 30 percent and "ability to synthesize data streams" at 11 percent.

After years of hearing about all the things MR needs to do in terms of enticing new people to join the industry, it was heartening, during the portion on talent and hiring, to hear the panelists talk about their successes in finding the right candidates.

Each of the firms appears to be thinking creatively about ways to attract applicants with broad skill sets; open, inquisitive minds; strong people skills; and an interest in what makes consumers tick. Those qualities are part of an acronym that Bryson said 20/20 came up with to encapsulate the things it looks for as it searches for new employees: CHILES G (with the CHILES part being pronounced like the Chili's restaurant chain): curiosity; humility; intelligence; likeability; enthusiasm; service-oriented; and gritty. "We look for talents, of course, but we look more for personal attributes as well, who a person is more than just what they can do," Bryson said.

Some sample observations on hiring from the panelists:

"You can teach people a lot of things but if you are not curious, if you don't want to learn, if you're going to sit on the sidelines waiting for someone to tell you what to do, things aren't going to happen," Lawrence said.

"You are looking for people who possess all of those [the CHILES G] qualities of course but especially you are looking for someone who can take a sense of data overload and turn it into a compelling story tied to a set of recommendations and actions," Young said. "That's the kind of thing that separates the people who are quote-unquote doing their jobs from the people who are truly taking it to the next level. I think sometimes some of the younger workers may default to wanting to give the client everything, for fear of leaving something out, but the challenge is much more, 'How do I take this information and turn it into something that is manageable and actionable?' And that dimension is sometimes where I see a separation [between prospective candidates]."

"Marketing research has a challenge because a lot of other industries are looking for those same talents and skill sets and research can be at a disadvantage because it doesn't come across as the most exciting career – until you're on the inside," Lawrence said. "But once we have a chance to get them on the inside and show them some of the things that are available to them, then it's a different situation. We've had a good run in that area, bringing people in from different backgrounds, and we've found that some of our best recruiters are the people on our own staff."

For more on this topic and the others we explored, check out the event recording at http://bit.ly/1KGbBd1.

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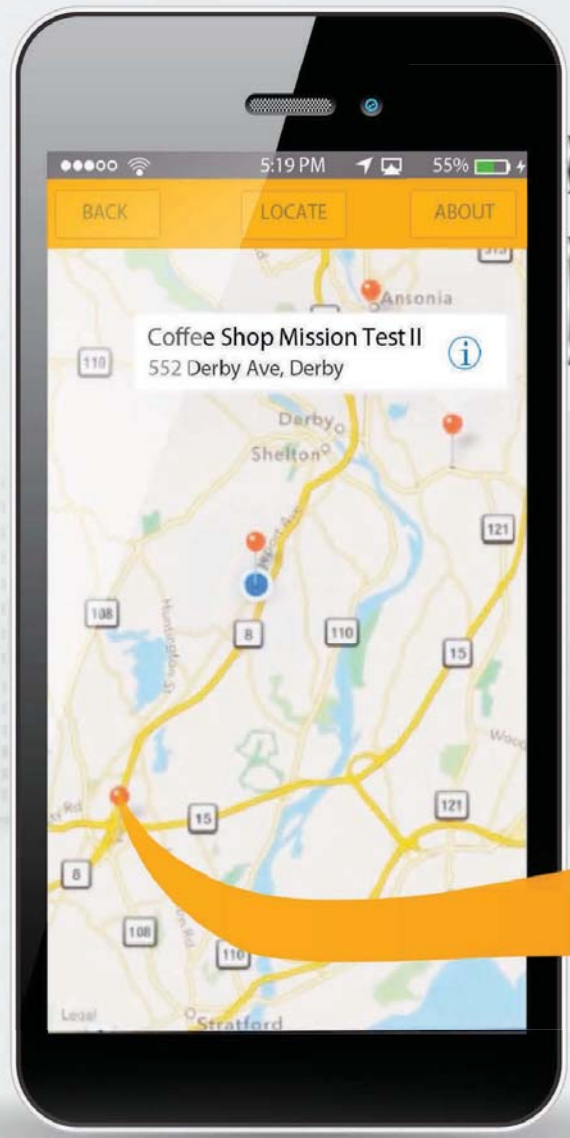
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••• loyalty research

Loyalty programs flourishing but need tending

Watching out for 'app-athy'

Enrollment levels in consumer loyalty programs have reached an all-time high as consumers continue to consider them valuable and credit them with influencing shopping behavior. According to a survey conducted by New York-based Bond Brand Loyalty, one-third of consumers agree they would not be loyal to the brand if it were not for a loyalty program and 70 percent of consumers modify when and where they shop to maximize points, up 13 percent over the past two years. In addition, loyalty programs were found to be a top contributor to brand loyalty, ranking higher than factors such as product and service availability, overall price and communications from the brand.

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The survey engaged more than 10,000 consumers to uncover insights on brands and loyalty initiatives used in industries such as retail, consumer packaged goods, financial services, entertainment and dining. Key findings are included in the 2015 Loyalty Report, available for download at www.bondbrandloyalty.com.

While the number of programs in which members are enrolled continues to grow, from about 10 programs per person in 2014 to more than 13 per person in 2015, the number of programs in which members are active is not experiencing the same level of growth. "While points and discounts drive behaviors, companies need to engage with consumers at a deeper level if they want to extend program loyalty into genuine brand loyalty," says Scott Robinson, senior director of loyalty consulting and solutions for Bond Brand Loyalty. "This necessitates thinking beyond a program's monetary incentives to focus on how it can better serve customers or make their experience with the brand more enjoyable, including fulfilling customer needs."

According to consumers, the three top functional-based satisfaction drivers in loyalty and rewards programs are the appeal of the rewards, the ease with which rewards can be redeemed and the amount accumulated per dollar spent. However, experience-based drivers are equally as weighty in terms of their influence on overall program satisfaction. The three top experience-based drivers are effort to participate, the program meeting needs and enjoyment of program experience.

"Brands with established loyalty programs now must make the shift to the future of loyalty and an experience-based model that is consistent with the overall brand," says Bob Macdonald, president and CEO of Bond Brand Loyalty. "It's more important than ever that companies focus on their best customers – and their data – to design a more personalized and authentic experience, which can help build stronger, more meaningful bonds with customers."

When it comes to mobile, strategic and creative approaches to engage consumers are equally essential.

Almost 50 percent of consumers want to engage with programs via mobile, yet the study reveals the presence of what may appropriately be termed "mobile loyalty app-athy." While 12 percent of consumers have downloaded a program app (up 5 percent over last year), 61 percent of smartphone owners are still uncertain if the loyalty programs in which they are enrolled offer a mobile app.

Only 30 percent of consumers surveyed strongly agree that loyalty program experiences are consistent with their brand or company experiences and nearly one-fifth strongly agree that it would be easy to replace a program with one from the competition, further illustrating the need for brands to build more unique experiences.

This year's study profiles over 100 loyalty programs. The overall top-rated loyalty programs as determined by customers who said they were very satisfied with the programs were Amazon Prime (71 percent) and Kroger Fuel (70 percent). Industry leaders included Food Lion's MVP Card (59 percent) and Cabela's Club Rewards (55 percent) in retail; L'Oreal Paris Gold Rewards (60 percent) and General Mills Box Tops for Education (51 percent) in consumer packaged goods; Subway's Subway Rewards (54 percent) and TGI Fridays Give Me More Stripes (62 percent) in quick-service restaurants and casual dining, respectively.

Programs that experienced the biggest increases in year-over-year satisfaction, as defined by customers who were very satisfied with the programs, were Subway's Subway Rewards (31 percent increase), Barnes & Noble Member (31 percent increase) and The Children's Place's myPLACE Rewards (30 percent increase).

Programs that experienced the biggest decreases in year-over-year satisfaction were Best Buy's My Best Buy (27 percent decrease), Outback Steakhouse My Outback Rewards (19 percent decrease) and Dove's Dove Insider (13 percent decrease).

••• hispanic research

Hispanic consumers not sold on newer payment methods

Mobile adoption lags

With the buying power of the U.S. Hispanic market now eclipsing $1.2 trillion annually, marketers are more focused than ever on attracting this lucrative consumer segment to their brands. However, as the number of payment options available increases, the connection between purchase and payment has far-reaching implications – from how marketing should be planned to how products are distributed and even to how sales are forecasted and measured.

When it comes to using financial instruments, Hispanics' monetary habits differ from those of the total U.S. population. According to Nielsen's Share of Wallet Study, 44 percent of Hispanics use debit cards most often, while 34 percent prefer cash or check. Only 19 percent use credit cards most often, compared with 35 percent nationally. Hispanics also trail in using new technology for payments – 5 percent of Hispanics shop, bank and pay using mobile devices and 20 percent of Hispanics are mobile payers/mobile payment users. Beyond payments, only 15 percent of Hispanics are mobile bankers, compared with 65 percent non-Hispanic whites, 11 percent African-Americans and 7 percent Asian-Americans, according to Nielsen's Q2 Mobile Wallet Report.

According to Nielsen data, two-thirds (66 percent) of total persons 18+ have an individually-owned credit card. Among Asians that increases to 80 percent, while penetration among Hispanics is 57 percent and 62 percent for African-Americans.

However, Hispanic consumers comprise many different groups, from their language to their origins. These subgroups have different purchasing habits and preferred methods of payment that can vary significantly from other ethnic groups. When breaking down Hispanics by the primary language spoken in the home, the percentage of English-only Hispanics who have an individual credit card is equal to the national average, and ownership among all Hispanics who speak at least some English is over 60 percent.

"The Hispanic consumer provides a plethora of engagement opportunities," says Monica Gil, senior vice president, multicultural affairs at Nielsen. "Marketers and brands may have an advantage in reaching this population group by providing products and services that meet the needs of this demographic."

Nielsen's Share of Wallet Study was administered as an online English-language survey to a general population survey between September and November 2014. The general population sample included 5,028 respondents aged 18 years or older, weighted by gender, age and race. Oversamples were conducted of 1,442 Asian-American, 1,499 African-American and 1,568 Hispanic respondents aged 18 years or older. The oversamples included CATI methodology for Hispanics and offered Hispanic respondents the opportunity to take the survey in English or Spanish.

••• lifestyle research

Kids and parents view neighborhood safety differently

A green, well-lighted space

Differences in the way children and adults perceive the world extend to their sense of safety in their social and physical environments and this in turn can impact their health, say researchers at the University of Montreal and its affiliated Research Centre at CHU Sainte Justine, a children's hospital, as reported by Newswise. "While we knew that a child's sense of safety is informed by his or her own parents' sense of safety, we did not know how the child's own perceptions of their environment contributes to this sense," says first author Carolyn Côté-Lussier, of the University of Montreal's International Center for Comparative Criminology.

Firstly, the research team surveyed 500 8-to-10-year-olds and their parents. The families live in the Montreal metropolitan area and were asked about their perception of their urban environment and their sense of safety. This was then correlated with various objective factors, such as the demographic makeup of the neighborhood, its traffic patterns, its lighting and the presence of trees and green spaces.

Overall, children's perceptions parallel those of their parents: If parents consider their neighborhood to be safe, so do their kids. However, kids' feelings are not drawn from their parents alone. Children see the objective factors in their environment differently from their parents. "Parents consider high rates of single-parent families, a lack of trust among neighbors and the presence of graffiti, rundown buildings and heavy traffic as being indicative of an unsafe environment, while children feel safer than their parents if the streets are better lit and if there is more greenery," Côté-Lussier says. She believes this is due to the fact that children are scared of the dark and because vegetation can reduce stress. "Planting trees is not just good for the environment, it also has a positive effect on the health and wellbeing of the population," she says.

These same human and physical factors are also correlated with a sense of not feeling safe among teenagers at school. In a second study, involving 2,120 teenagers from across Quebec, the research team observed that poverty (whether chronic or occurring after the age of 10) only partially explains a sense of insecurity among teens.

"Poverty is a factor that increases the risk of victimization at school, but, youths' feelings of a lack of safety are also linked to living in neighborhoods that parents describe as being demarked by the presence of litter, drug use and sales and groups of youth causing trouble. A high rate of single-parent families and a lack of green spaces also play a role," Coté-Lussier says, noting that these environmental factors must also be addressed when intervening to reduce insecurity in schools.

The findings are important because feelings of safety can be a pathway linking poverty, the local environment and health. "Lower family incomes are associated with lower perceptions of safety in the neighborhood and at school, and this perception is in turn linked with a greater rate of health problems such as obesity," Côté-Lussier says.

Studies also show that a low sense of safety is indicative of a poor quality of sleep, asthma, psychological distress and a lack of physical activity. "If the neighborhood is perceived as being less safe, children will be less likely to take physical exercise outdoors and more likely to spend time in front of a screen. Moreover, feeling unsafe could contribute to a deregulation of the endocrine system and to poorer health," Côté-Lussier says.

••• financial services

Number of world's 'unbanked' declines

Women are still underserved

Access to financial services and products has expanded rapidly across the globe in the past few years. The number of adults worldwide who report having an account at a formal financial institution or through a mobile device grew by an estimated 700 million between 2011 and 2014. Now, 62 percent of the world's adult population has an account, which is up from 51 percent in 2011.

As reported by Gallup Inc.'s Peter van Oudheusden and Jan

Sonnenschein, these results come from the 2014 Global Financial Inclusion (Global Findex) database, which measures the extent of account penetration, the use of mobile money payments and saving and borrowing practices in more than 140 countries. It updates the original Global Findex, which the World Bank launched in 2011 in cooperation with Gallup and is funded by the Bill and Melinda Gates Foundation.

Account penetration – defined as having an account at a formal financial institution or a mobile money account – remains highly unequal across regions. It is almost universal in high-income Organization for Economic Cooperation and Development (OECD) economies (94 percent), while slightly more than half of adults (54 percent) in developing economies have an account. Although many adults in developing economies remain excluded from the formal financial system, there is good news: Account penetration in the developing world is up 13 percentage points from 41 percent in 2011.

Accounts at financial institutions drove the increase in account penetration in all regions except sub-Saharan Africa, where almost one-third of account holders dial into the financial system using mobile money accounts. The rising popularity of these accounts helped push overall account penetration in the region to 34 percent, up from 24 percent in 2011. Outside sub-Saharan Africa, use of mobile money accounts remains limited, reported by 3 percent of adults in South Asia, 2 percent in Latin America and the Caribbean and less than 1 percent in all other regions.

South Asia and East Asia and the Pacific are home to about half of the world's 2 billion "unbanked" adults. In South Asia, about 625 million adults lack account access and the same is true for about 490 million adults in East Asia and the Pacific. India, China and Indonesia alone account for 38 percent of unbanked adults globally. Sub-Saharan Africa has the next-largest population of unbanked adults, at about 350 million, or 17 percent of the global total.

Despite recent global growth, the gender gap in account ownership has not closed. Forty-two percent of women are unbanked, compared with 35 percent of men. Access to the formal financial system is also stratified by wealth. Half of the unbanked worldwide – 1 billion adults – belong to the poorest 40 percent of households. However, in developing economies, the gap in account ownership between adults living in the poorest 40 percent of households and those living in the richest 60 percent narrowed by six points in the past three years. But this decrease stemmed overwhelmingly from rising account ownership among the poor in East Asia and the Pacific; in all other regions, the gap remained about the same.

As in 2011, the most common reason cited for why adults remain unbanked is the lack of money. Fifty-nine percent list poverty as one of the reasons for being unbanked but only 16 percent cite it as the sole reason. In all developing regions except Europe and Central Asia, lack of enough money is the most commonly cited reason. It is important to add that just 4 percent say lack of need is the only reason they do not have an account, underscoring the unmet demand for financial services among the unbanked. Beyond this, the reasons residents are most likely to report vary according to local conditions. In sub-Saharan Africa, distance to financial institutions is the second-most commonly reported barrier, cited by 27 percent. In the Middle East, 41 percent of adults without an account say they cannot get one. This likely reflects prohibitive costs and documentation requirements for opening an account.

Three years ago, 2.5 billion adults worldwide were unbanked. Despite the progress since then, 2 billion adults remain excluded from the financial system with unmet needs and untapped market potential.

Findings also show that most of the unbanked do want to open an account. Two possible avenues to expand financial inclusion are digitizing payments – wage payments or government transfers – and formalizing saving practices.

Results are based on telephone and face-to-face interviews with approximately 1,000 adults per country, aged 15 and older, conducted in 2014 in more than 140 economies. For results based on the total sample of national adults, the margin of sampling error ranged from ± 2.5 percentage points to ± 5.2 percentage points at the 95 percent confidence level.

••• travel research

Luggage market poised for growth

Counterfeiters loom

According to a new report by New York-based Persistence Market Research, the global luggage market is expected to grow at a CAGR of 5.8 percent during 2014 to 2020 and to reach an estimated value of $43.4 billion in 2020.

Increasing urbanization and changing lifestyles are the key drivers for the global luggage market, according to the report, Global Market Study on Luggage: Travel Bags to Witness Highest Growth by 2020.

Technological advancements are further creating opportunities for luggage sales among high net-worth individuals, for whom safety is a major concern. Increasing travel and tours, rising business activities and growing numbers of educational courses are further propelling the demand for luggage. Luggage is sold through various types of distribution channels such as specialist retailers, factory outlets, supermarkets, hypermarkets and Internet sales. Owing to the boom in online commerce, luggage sales through the Internet have been growing at a significant pace.

To some extent, luggage is considered as a lifestyle product, especially in developing countries. Earlier, people in developing countries used one luggage for all purposes such as travel, touring and business. However, owing to growing urbanization and rising disposable income, their lifestyles have changed, which is also reflected in their usage of purpose-based luggage. Asian and African countries are expected to experience highest urban growth in the future. According to the China Development Research Foundation, the urban population in China is expected to increase from 52.6 percent in 2012 to 70 percent by 2030. Urbanization is growing at a swift pace across Asia-Pacific. Pacific countries such as Australia and New Zealand already have high urbanization.

The major players in the global luggage market include Samsonite International S.A., Tumi Holdings Inc., VIP Industries, VF Corporation, Briggs & Riley Travelware, Rimowa GmbH, MCM Worldwide, Louis Vuitton Malletier S.A., Goyard and ACE Co. Ltd.

The large, unorganized luggage markets in developing countries pose one of the greatest challenges for the organized luggage market. Countries such as China and India have large number of unorganized players. These regional players usually launch products with designs almost identical to those of the brands of global organized players. Unorganized players offer luggage at low costs as they save on costs of high-quality raw material, branding, advertisement and R&D. The low- and medium-income populations in developing countries are the largest consumers of such relatively inferior products, siphoning prospective customers from the established luggage brands. In the absence of a strong anti-counterfeiting framework in developing countries, these unorganized players are flourishing and restraining the growth of the organized luggage market.

IN FOCUS

Product and Service Update

••• new product research

Speed up concept tests with Idea Accelerator

Hours instead of weeks

San Francisco researcher Antedote has introduced the Idea Accelerator, an online qualitative research program that presents visual, written or video materials to participants on desktop, tablet or mobile devices. The platform tags the response data for analysis and adds heat maps for each individual idea or concept. A multiple-market concept study can be done in hours vs. weeks and months with traditional approaches. It is designed to: identify specific elements that are working and not working in a idea and concept and why; enable in-the-moment crafting of ideas and concepts with consumers; allow for immediate idea and concept testing and retesting; enable exploring and testing ideas and concepts in early development; and removes the "test, pass, fail and replace" model often used to craft concepts.
www.antedote.com/tag/idea-accelerator

quirks.com/articles/2015/20150604.aspx

••• text analytics

Program tests the quality of open-ends

Assigns scores from 0 to 100

Westport, Conn., technology firm Imperium has launched Real Answer, an automated program designed to ensure the authenticity and quality of open-ended survey responses. The program assigns a Real Answer score of 0 to 100, based on the quality of the response as it is evaluated against several critical factors, including having garbage words, profanity and sexist or racist terms, having responses that have been pasted from a respondent's clipboard or are identical to previous answers or having responses robotically inserted.
www.imperiumsolutions.net

••• media research

Starcom updates PACE Panel

Lets diary users add more detail

Chicago marketing and advertising firm Starcom MediaVest Group is updating its PACE Panel software, which provides media usage diary data, mobile usage data and custom research panel capabilities. The new features provide re-contact questionnaires and custom panels, allowing diary users to add detail or target particular groups for product development and concept testing. The panel is currently available in the U.K. and U.S. and will shortly roll out in Canada and Mexico. The company plans to add more than 15 additional markets by the end of the year, including Australia, India, Russia, Saudi Arabia, Ukraine and Poland.
www.smvgroup.com

••• usability research

Firms team to measure site visitor feedback

Qualtrics partners with Usability Sciences

Qualtrics, a Provo, Utah, research technology firm, and Usability Sciences, a Dallas research firm, are partnering to combine the Qualtrics Site Intercept product with Usability Sciences' user research portfolio to help turn visitor feedback and behavior into actionable insights. Qualtrics customers who purchase Site Intercept and engage with Usability Sciences will receive a research engagement led by a Usability Sciences' research specialist that includes: strategy sessions; survey design and implementation; design and delivery of interactive, storytelling dashboards that expose the causes of visit failure; and recommendations for improving the Web site experience.
www.qualtrics.com

••• restaurant research

What's on the restaurant goer's menu?

Service sketches patron profile

Technomic, a Chicago research firm, is now offering Consumer Narrative, a service that identifies key demographics of a restaurant chain's typical patron, such as age, gender and average household income to uncover

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sample@visioncritical.com | www.visioncritical.com/voice-of-market what that patron wants from the brand and from the restaurant's segment as a whole, from how they compare the brand to the competition to which menu items they crave. It is based on more than 7.5 million consumer ratings per year compiled within the firm's Consumer Brand Metrics tracking study. Consumer Narrative also reveals consumer attitudes towards a restaurant brand's technology capabilities, including the integration of technology into the experience and the ability to pay for and order using mobile devices. www.technomic.com

••• shopper insights

Vision Critical offers Retail Intelligence Suite

Measures loyalty, CX

Vision Critical, Vancouver, Canada, has introduced its Retail Intelligence Suite, a software platform which provides retailers with a dialogue with a secure, opt-in online community. Retailers can use the program to measure customer loyalty, improve customer experience and generate new ideas based on customer feedback. The Suite program is built on the Vision Critical customer intelligence platform. Users can: build member profiles for customers as they change over time; deploy regular customer engagement projects; leverage a customer intelligence library pre-programmed with activities designed to address common retail challenges; and share insight with stakeholders across the company. www.visioncritical.com

••• customer experience

VoX marks the spot

J.D. Power service links CX and bottom line

Westlake Village, Calif., research firm J.D. Power has launched VoX (Voice of Experience), linking customer experiences and financial results to help companies spot trends in customer preferences, changing customer demographics and competitor responses. VoX displays interactive data for all levels of an organization, from executives to the frontline staff interacting with customers, to determine how to improve the customer experience and drive loyalty, advocacy, sales and service. www.jdpower.com/vox

••• advertising research

Ace Metrix measures ad personality

What's powering resonance?

Ace Metrix, Mountain View, Calif., has introduced the Ad Personality Profile, a framework designed to reveal which creative characteristics are most influential in powering ad resonance. Ad Personality Profiling provides a bridge to guide marketers from an ad's holistic Ace Score to its relevant convergence points of viewer feedback. Combined, the Ace Score, Ad Personality Profile and an array of supportive data points can tell the story of each ad's journey toward fulfilling the objectives of its creative brief. www.acemetrix.com

••• cosmetics research

L'Oreal app lets users try on makeup

Results can be shared to social media

The L'Oreal Paris cosmetic firm has designed an augmented reality makeup mirror, Makeup Genius, which uses facial mapping technology to allow users to virtually try products. The platform, available as an Apple or Android app, turns the front-facing camera of a smartphone or tablet into a virtual mirror. Users can scan a L'Oreal product or advertisement to "try on" individual products or an entire look from a makeup artist and then share the result on Facebook. The app was developed with help from Santa Monica, Calif., Image Metrics, the Oscar-winning firm responsible for the visual effects of *The Curious Case of Benjamin Button*. With some modifications, the app could well be useful in other product testings. www.lorealparisusa.com/en/brands/makeup/makeup-genius-virtual-make-up-tool.aspx

••• retail research

Snap a pic of that for me, will you?

Visor app fields requests for on-site images

Want to see how the cereal is displayed in New York, Chicago and Los Angeles supermarkets? Compare checkout lines at Home Depot and Lowe's? Visor, a New York technology company, has an app for that, allowing users to see what's happening anywhere in the world. The process

begins with a user making a request ("Take a picture of the garden center at Home Depot") and putting it out via the Visor app. A message is sent to a Visor user near your selected Home Depot store, who opens the app and takes a picture. You are then notified that your request has been completed. Currently, all photos are free. The feedback may not be exact but could be used by marketers and researchers to check on brands or projects.
www.visor.co

••• Briefly

■ Stamford, Conn., researcher FocusVision has released its Discussion Engine for its Revelation qualitative mobile and Web platform, designed to work with mobile diaries, bulletin boards and insight communities. It provides an activity engine which can post images, provide quick interactions and facilitate moderator communication with the participants.
www.focusvision.com

■ Seattle insurance company ATG Risk Solutions is developing assessments of driving behavior, described as the equivalent of a FICO score for an individual driver, by utilizing data from state departments of transportations, self-insured fleets, collision data and other traffic services. The company has received about $1 million in seed funding.
www.atgrisk.com

■ Oslo, Norway-based research software firm Confirmit has invested in a dedicated SaaS site located in Sydney for its Horizons product, which enables clients to conduct surveys on various platforms and channel them into a single feedback tool. The dedicated site will provide faster delivery and more effective use of time-sensitive CATI interviews and mobile surveys. In addition, the site will address the need for in-country data storage in accordance with the Australian Privacy Act. Separately, Confirmit is partnering with Language Connect, a London translation specialist, to develop Connect Survey, which can translate surveys and feedback into multiple languages. The program has been used on a trial basis by a number of mutual customers, with early results showing a reduction in translation time of 90 percent. Also, Confirmit has introduced a CAPI interviewer based app for Android built on the Confirmit Horizons platform which will allow companies to create one survey and deploy it across multiple channels. The app supports all the question types of the Horizons platform including multimedia support and is available in 42 languages.
www.confirmit.com

■ Port Washington, N.Y., researcher the NPD Group has launched a home automation advisory service which includes reports from consumer panels, POS data, qualitative reports and expert analysis. Home automation areas include centralized control of lighting or heating, appliances and locks on gates and doors.
www.npd.com

■ San Francisco software firm GinzaMetrics has introduced an analytics product, the Social Intelligence Suite, designed to help marketers tie social media campaigns to overall revenue. The suite includes Marketing Channel Performance, Competitor Social Landscape, Content Insights and Social Engagement Analytics.
www.ginzametrics.com

■ Sawtooth Software, Orem, Utah, has released its Discover platform, which designs, executes and analyzes choice-based conjoint studies. The software is browser-based and works on touchscreen mobile devices in addition to desktop and laptop computers.
www.sawtoothsoftware.com

■ Palo Alto, Calif.-based SurveyMonkey has launched a benchmarks tool which creates indexes by industry, location and company size by aggregating and anonymizing some of the company's 3 million daily survey responses. It will let customers determine how they compare to peers and competitors by providing information on Web site feedback, customer satisfaction, employee engagement and customer loyalty.
www.surveymonkey.com/mp/benchmarks

■ Vivisum, a Durham, N.C., research firm, has launched Brand Builder, a platform combining qualitative and quantitative methods to provide strategic market insight for pharmaceutical brands. It includes a diagnostic tool that examines brand characteristics across five dimensions and then designs a customized plan for the brand development process through to post-launch.
www.vivisumpartners.com

■ Reston, Va., research company comScore has introduced its Mobile Metrix platform into Colombia to provide audience figures for smartphone and tablet users via both apps and browsers and across both iOS and Android mobile platforms.
www.comscore.com

■ New York research company Millward Brown has launched LinkNow for Digital, a tool which helps brands evaluate their digital advertising across multiple executions. LinkNow measures the performance of online video, display, Facebook and mobile creative in less than six hours, allowing marketers to determine the strongest edits for particular markets and how a final ad will perform in-market. The solution is available through Millward Brown partner ZappiStore.
www.millwardbrown.com

■ Portland, Ore., firm Dialsmith has added features to its online survey and media dial testing software, Perception Analyzer Online, which enable researchers to conduct testing on iPads and other tablets as well as using the PA Online media testing interface.
www.dialsmith.com/products/perception-analyzer.html

■ People Pattern has launched its Audience Insight platform which allows users to attach unstructured data (public posts, tweets, blog comments) to structured data, such as customer or transactional data. The Insight data can then predict audience segments using demographics, interests and media behaviors. www.peoplepattern.com

■ Lightspeed GMI, a Warren, N.J., researcher, has introduced its Quick Turn Insights solution, which allows clients to include up to five digital media files and open-end questions in their surveys. The clients can reach pre-screened consumers for fast feedback, with turnaround time of 24 hours. www.lightspeedgmi.com

■ San Francisco technology firm Wizeline now offers a software product that provides information on the status and performance of products in each stage of their lifecycle. Enhancements to the platform include CRM integration and tools for managing product requests, releases and roadmaps. www.wizeline.com

■ NeoGrid, a Joinville, Brazil, software provider, is partnering with New York researcher Nielsen to introduce two products for the Latin American supply chain market. They are Supply Chain Insights, which provides information on products at the point of sale, and Supply Chain Benchmark, which allows manufacturers and retailers to compare their performance with the market averages of their industry. www.neogrid.com

■ New York social media technology firm Sprinklr has introduced Experience Cloud, an integrated platform to help brands deliver a consistent experience over all social channels and Web sites. www.sprinklr.com

■ Germany-based GfK Group plans to expand its point-of-sale pet specialty data collection to Canada and create a point-of-sale panel to capture sales data nationwide for retailers and manufacturers. It currently has a similar data collection program in the U.S. of over 11,000 pet specialty outlets. Separately, GfK has released an enhanced version of its Spex Access platform which provides manufacturers with structured and unstructured A+ content to construct enhanced marketing and brand pages for consumers. Online shoppers will also have access to 57 million product reviews. www.gfk.com

■ New York researcher Nielsen has renamed its digital measurement tool Nielsen Digital Ad Ratings. Formerly called Online Campaign Ratings, the tool provides information on a campaign's audience across computers, tablets and smartphones. Nielsen has also enhanced the tool's user interface, adding a dashboard with an overview of the client's set of campaigns, alerts and status and exportable charts and graphs. www.nielsen.com

■ Atlanta telecommunications company Intelliverse has introduced Email Tracker, allowing e-mail marketers to track their campaigns. The tool provides information as to the time an e-mail is opened, the device used to open the message and the recipient's location. www.intelliverse.com

■ Appboy, a New York marketing software firm, has added a tool for retention data analysis. The software tracks both short- and long-term retention data, giving brands information as to how customers are using their mobile apps. www.appboy.com

■ Verbatim-VR Ltd., Israel, has updated its voice recognition software to incorporate corrections of voice recognition errors into the knowledge base of the software. The ongoing updates will improve the accuracy of the voice recognition of every user. www.verbatim-vr.com

■ In Manila, the Philippines, Tekibears Software Solutions has launched Winkbee, a social network app billed as welcoming everyone but "especially the LGBT community." The flexibility of the app allows it to be used for interaction with friends, colleagues or family. www.tekibears.com

■ Netquest, a Barcelona, Spain, online data collection specialist, has launched NiceQuest, a mobile app that collects responses to online surveys as well as data on the online behavior of the respondents. Panel members can answer surveys, access incentives, manage personal data and share their geolocation, while researchers will be able to see their habits and consumption decisions. www.netquest.com

■ SERMO, a New York medical social network site exclusively for physicians, has expanded to the U.K. It will add 38,000 U.K. physicians to the current network of 305,000 U.S. doctors and plans to expand to additional countries by the end of 2015. www.sermo.com

■ New York marketing and advertising firm xAd has launched its Blueprints software solution, which provides specific consumer location information. The technology indicates the consumer place data based on the physical boundaries of retail businesses rather than the street address, providing more accurate counts of store visits. The Blueprints solution already has physical boundaries marked for more than 12 million U.S. business locations and uses a visual mapping algorithm to update address listings as processed by the U.S. Postal Service. www.xad.com

■ YouTube is planning to offer a subscription-based service which allows consumers to pay for an ad-free version of YouTube for a monthly fee. YouTube Partners will receive 55 percent of the total net revenues from subscription fees that can be attributed to the monthly views or watchtime of their content. YouTube did not disclose the price of the subscription or when it will launch, although it is expected to go live this year. www.youtube.com

■ US Monitor, a New York mail monitoring specialist, is introducing a mail condition reporting service, providing businesses with information if their envelopes arrived ripped or creased, with smudged or mis-placed addresses or missing inserts. Direct mailing

companies can have scans of the damaged mailers sent to them or have the mailings returned. Information on problems can help the firms decide on production methods for future mailings, including printing and addressing methods.
www.usmonitor.com

■ RetailNext, a San Jose, Calif., retail analytics specialist, has launched its Accelerator Kit, which utilizes video analytics, shelf sensors and point-of-sale data to analyze in-store shoppers. Using the RetailNext software platform, retailers can measure pass-by traffic and capture rate, repeat and unique visitors and the frequency and duration of store visits.
http://retailnext.net/products

■ Cambridge, Mass., social media research firm Digimind has launched a Social Analytics tool which can analyze multiple social media accounts in a single interface. The platform automates all repetitive types of analysis, from data collection to information management to compilation and sharing. The tool provides an aggregate analysis of all social media accounts to help firms determine what is working best to engage their online communities. It will also provide competitive benchmarking to help brands examine how to increase their market share.
www.digimind.com

■ Kinesis Survey Technologies, Austin, Texas, and Tango Card, a Seattle technology firm, are partnering to offer an integrated platform that provides a fully automated redemption solution for online research panels. The platform allows panel managers to deploy rewards instantly through a single environment. Kinesis had begun offering the reward solution to its clients in early 2015.
www.kinesissurvey.com

■ Translation Cloud, Jersey City, N.J., has expanded its services to offer translation for practically any audio and video format. Customers receive a detailed transcription with each speaker clearly delineated and time stamps provided at requested intervals. The transcription can also be translated into additional languages as needed.
www.translationcloud.net

■ Shelton, Conn., researcher SSI has partnered with Westport, Conn., research company Imperium to launch Real Answer, an automated technological solution which authenticates the answers to open-ended surveys. The solution can detect answers which are gibberish, inappropriate, pasted or robot-generated. It also evaluates engagement by comparing the relative length of responses to a question. Results are available in real time with no interruption to the user.
www.surveysampling.com

■ Neustar, a Washington, D.C., information and analytics specialist, and Marketo, a San Mateo, Calif., software company, are partnering to create a new B2C program to increase marketing campaign precision. Neustar's platform will link online and mobile profiles as well as offline information, identifying shoppers who are most likely to purchase the product. Marketers can then engage the prospects at the right time with the appropriate message and using the best method.
www.neustar.biz

■ Forbes Media, New York, has agreed to work with rFactr, a social communication management software firm, to create the Forbes SocialPort. It will allow companies to share their marketing content on social platforms, with users utilizing the SocialPort to write, schedule and publish content across all social networks. User dashboards can track the effectiveness of campaigns and provide insights across the social networks.
www.forbes.com

■ Provalis Research, Montreal, has integrated WordStat7 with Stata, combining the numerical analysis of Stata with the text analysis features of WordStat7. Current WordStat7 users can download and activate WordStat for Stata for free.
www.provalisresearch.com

■ Jon Gumbrell and Mike Hall have joined with Paris survey software specialist Askia to launch Platform One, a customer feedback platform. The software is designed to handle customer feedback scenarios from both qualitative and quantitative panels of any size, as well as voice of the customer programs.
http://platform1.net

■ Primesight, a London outdoor advertising company, has partnered with On Device Research, London, to create Primemobile Live, a real-time reporting software for outdoor ad campaigns. The online portal will provide data on campaign awareness during the campaign period. Clients can access performance data while the campaign is active, allowing digital display advertisers to make creative changes or adjust the weight of exposure. The data can be analyzed by audience segment, individual treatment and GPS location.
www.primesight.co.uk

■ London technology provider OnePoint Global is offering a new pricing model, allowing a single named user to create unlimited branded apps, mobile Web, online and SMS surveys for a flat rate of £45 per month.
www.onepointglobal.com

■ YouEye, a San Francisco technology firm, has launched the Experience Analytics Platform, which is designed to analyze unstructured and semi-structured data such as focus group videos. It includes five components, including a behavior metrics module, a highlights compilation feature, a survey results component, a demographic segmentation section and a tasks module which guides the analysis.
www.youeye.com

■ In Boston, text analytics specialist Lexalytics has expanded its language capabilities to include Arabic, Russian and Dutch, bringing the total of its supported languages to 16.
www.lexalytics.com

■ Qzzr, a Lehi, Utah, software firm, has rolled out Pollcaster, a platform which allows users to create and embed social media polls on their Web sites. With the software, researchers or companies can launch mobile-first, responsive online polls, post them online and track results through a choice of analytics. Pollcaster can also display a breakdown of any opinion by region, age and gender.
www.qzzr.com

Using hyperlink networks to data-mine the Web

| By Michael Lieberman

snapshot

Michael Lieberman explores the VOSON Data Provider, a plug-in for analyzing hyperlink networks.

Many research groups and start-up companies have developed tools for social media network analysis and visualization. Today, network metrics have become commonplace and functionality on layout and clustering algorithms has expanded dramatically, producing breakthroughs that have raised radically the quality of what it is possible to visualize.

The largest network graph, when Web pages link to one another, is the World Wide Web. The tens of billions of pages on the Web can each be seen as a vertex in a graph whose edges are URL hyperlinks connecting one page to another. There is no larger source of interlinked information.

Professor Robert Ackland of the Australian National University has spent a great deal of time on this topic. He writes, "These hyperlinks may point to other pages on the same Web site or to sites of other organizations, companies, institutions and nations. The result is literally a web of connections that is often mentioned but rarely seen. The network of related Web sites, although based on basic 'Web 1.0' technologies, represents important social, economic and institutional relationships that can reveal significant insights for researchers, policy makers and corporate strategists."

There has been a lot of hype about Twitter, Facebook and Flickr, but Web pages remain the untapped goldmine of big data information. An entire industry, search engine marketing, has grown up around the explosion of the Internet. But who your Web site is connected to, and who connects to your Web site, is really the mother lode of network takeaways. With new technology, these links have now come online using free, open-source software and can be analyzed using Excel graphics.

Collecting and analyzing hyperlink network data allows you to answer critical questions such as: How does your organizational Web presence compare to your offline brand presence? How does your organizational Web presence compare to that of your competitors? Hyperlink data can also help you identify new competitors. If you are entering a new market, these data can give you a sense of who the current players are and how they are related. If your organization is in the area of public affairs, what other organizations are linked to it? If you run a non-profit, who links to you? In other words, where is your best fundraising source?

The VOSON Data Provider

The VOSON Data Provider is an Excel data import plug-in for the collection and analysis of hyperlink network data. It provides a front end to a data collection and processing service that is part of the Virtual Observatory for the Study of Online Networks (VOSON). This data collection and processing service consists of a Web crawler that crawls seed sites nominated by the user, extracting

quirks.com/articles/2015/20150605.aspx

Figure 1: A One-Degree Hyperlink Network
Quirks.Com

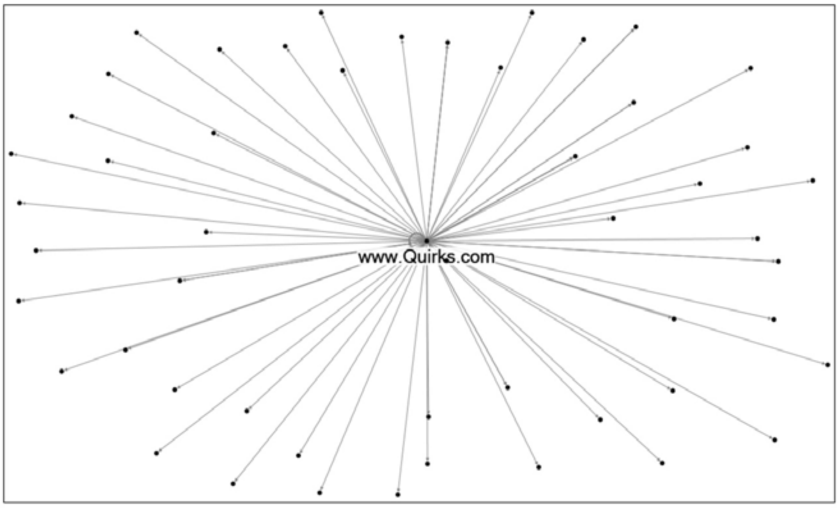
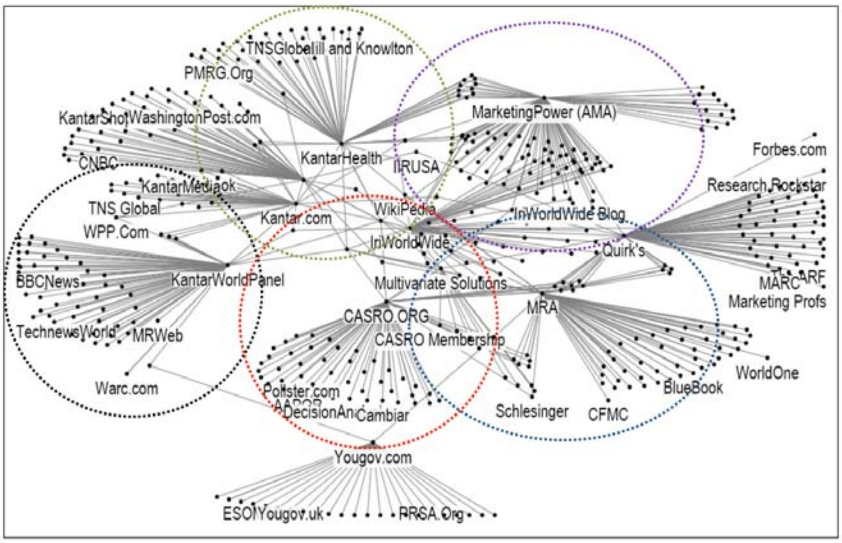


Figure 2: Hyperlink Network
Marketing Research Industry



hyperlinks to other sites. The service also finds inbound hyperlinks to given seed sites.

One needs an account with VOSON but a free version is available for up to 10 databases. Of course, Web crawling is nothing new: Spammers have been doing it since the Web was first woven. I see VOSON as particularly useful in that it is a specialized hyperlink search service that works within the framework of Excel. The results, which are delivered in a format much like, say, Twitter links, makes it easy for non-programmers with a bit of Excel savvy to edit, shape and ultimately visualize and analyze data.

An examination of hyperlink visuals reveals that maps come in different degrees. A one-degree map – known also as an ego network – shows the result when only one seed site has been crawled. Figure 1 is an example of a one-degree hyperlink map without labels. I like to call it "the porcupine."

A 1.5-degree map takes into account every page to which a Web site is connected and whether these pages are connected to one other. That is, for Quirks.com, we would see all the dots, plus arrows to the dots that are connected to each other.

A two-degree map collects every page to which a Web site is connected and every page to which they are connected. This is where the real deep dives lie. However, two-degree map data points expand exponentially. If a Web site is connected to 100 other sites and each of those is connected to 100 other sites, there would be 10,000 points. Most major Web sites are connected to far more than 100 Web sites or blogs.

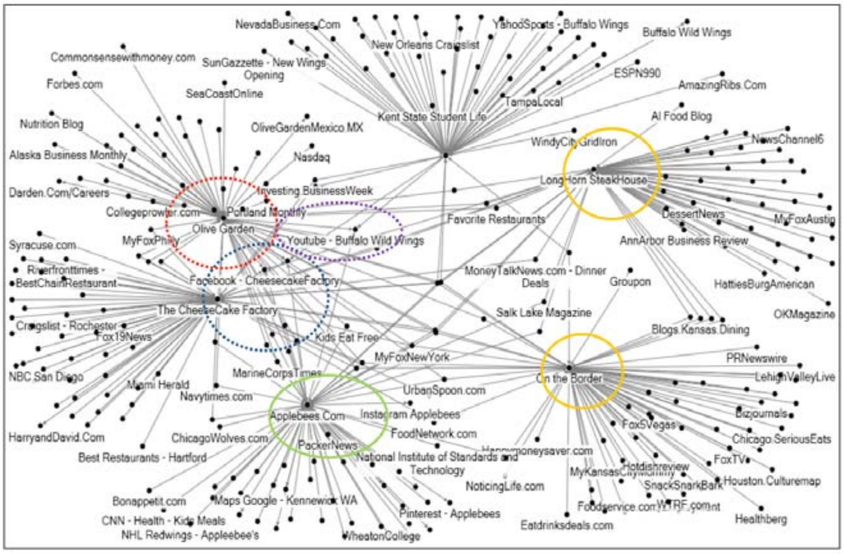
A map of the marketing research industry

Figure 2 shows a hyperlink social map of the marketing research industry. It began with Quirks.com. However, I added about 10 other seed sites, prominent marketing research organizations (e.g., the MRA, CASRO) and some of the largest international marketing research firms (Kantar, Yougov).

The resulting database had well over 1,000 links. For reasons of space and clarity, this network is likely to suffer from an overflow of labels and may be difficult to analyze. The most common way to counteract this is to create a subnetwork consisting only of seed sites plus important links. This requires filtering the database in Excel and labeling those sites that will produce the greatest clarity for the network. This requires eyeballing and filtering the database in Excel or employing a VLookup function. However, the filtering process is not beyond the skills of any moderate Excel user.

We have done this for our marketing research hyperlink network. We then ran the network through a clustering algorithm (specifically, the Harel-Koren fast multi-scale).

Figure 3: Hyperlink Network
Casual Dining Restaurants



The resulting visualization is shown in Figure 2.

The graph discloses several points that illustrate the power of the technique. They are summarized below.

- Most major marketing research organizations are connected.
- PMRG.org, not a seed site, is connected to Kantar Health, which specializes in pharmaceutical research.
- The Web site of WPP, which owns Kantar, is connected to most of the Kantar Web sites.
- Quirk's sits squarely in the middle of the marketing research Web space, also taking into account reporting sites such as Research Rockstar and Marketing Profs.

Case study: casual dining restaurants

Next, I tried a hyperlink network for an industry for which I do a lot of work, casual dining restaurants (CDRs). The seed sites were several of the most popular restaurants, such as the Olive Garden, the Cheesecake Factory, Buffalo Wild Wings and Applebee's, among a few others.

In Figure 3 I have circled some of the seed sites and labeled some of the more interesting links. Several elements in the graphic come to our attention.

- There is a link between Applebee's and the Detroit Red Wings hockey team. As it turns out, the Red Wings and Applebee's had a co-branding effort so that Red Wings fans would enjoy a meal at Applebee's before the hockey game.
- The Cheesecake Factory has a link to Craigslist. A new Cheesecake Factory location listed employment opportunities in Rochester, N.Y., on Craigslist.
- MoneyTalksNews.com is connected to several of the leading CDRs.
- Many university student life sites connect to CDR restaurants.
- HarryandDavid.com, the gift-box Web site, is connected to CheesecakeFactory.com.
- On The Border is connected to Groupon, indicating an effort by that chain to lure customers through the Groupon Web site.
- Darden.Com/Careers connects to the Olive Garden, which is owned by Darden restaurants.

The upshot of this heavily-filtered and -labeled graph is that the Web space of the casual dining industry connects to parent companies and to many media outlets that cover the industry. There are blogs from Urbanspoon.com, nutritional write-ups from CNN Health, etc.

Hyperlink network analysis lacks the fluidity, of, say, Twitter, and therein lies its usefulness. One can run a Web crawl for an industry space and be fairly sure that the structure will be intact for a period of a month or longer. Moreover, hyperlink crawls can be filtered to show only blogs, media and other specified outlets.

Still a vital aspect

Hyperlink networks have been around since the dawn of the Web and they are still a vital aspect of the online behavior of commercial entities, private individuals and government. Hyperlink data have been used for research into marketing and for competitive business intelligence. For example, researchers have constructed networks of telecommunication company Web sites using co-link data and show that visualization of these networks correctly maps the companies into industry sectors.

We expect the availability of tools such as VOSON to have a positive impact on hyperlink research. As mentioned above, dynamic hyperlink analysis is a fruitful area of study, as is research into approaches for jointly analyzing hyperlink and text-content data. Many companies have learned to harness the power of thought leaders, experts and influencers to promote their products and with hyperlink Web space visualizations, researchers can easily visualize and analyze these often complex interrelationships.

Michael Lieberman is founder and president of Multivariate Solutions, a New York statistical consulting firm. He can be reached at 646-257-3794 or at michael@mvsolution.com.

To thine own self be true

| By Robert Sinclair

snapshot

To get the most from service and satisfaction measurement, keep the measurement process authentic.

"To thine own self be true" – six little words from Shakespeare packed with meaning. This phrase defines authenticity – having candor and not playing games. Unfortunately, within many organizations today, authenticity is in short supply. Sometimes being authentic within the organization can have a negative impact on advancement or even lead to job loss.

Businesses don't intentionally leverage their own authenticity for image – style over substance, quick impressions over long-term vision. Nevertheless, it happens, somewhere in the management chain, when truth is met with resistance. When this occurs, the organizational damage can be hard to calculate.

Failure to be genuine up and down the management chain has been the Achilles' heel of many businesses. Customers overlook nothing and detect every operational flaw of a business, easily distinguishing between superficial and authentic.

As a longtime specialist in the field of customer measurement, I've seen notable organizations, seriously lacking in the ability to self-assess, that are unwilling to see themselves as failing to meet their own brand promises to their customers. One might ask, "Why pay for measurement if you're not going to use it honestly as a tool to improve?" Good question. Businesses may miss the mark by not realizing that the misuse of measurement is much more than a waste of money; it negatively skews their own self-image by overinflating the company ego based on untruths.

To illustrate my point, here's an example many can relate to. Most people find the car-buying experience about as much fun as having a root canal. Consider the typical car-buying encounter: first there's the negotiation with the sales person, followed by the sales manager, a back-and-forth process that can take hours just to arrive at a price for the vehicle; introduce a trade-in and you're adding to the headache. Next comes the finance office, which is where the dealership makes most of its money. In addition to the interest rate comes all the extras like: extended warranties, maintenance plans, loan insurance, various protection plans, etc. By the time it's done, you've been at the dealership half the day and feel worn out and exhausted.

So you've made it through the car-buying process and you're finally ready to leave the dealership but just before you drive off the lot you hear someone say, "You'll be receiving a call [survey] sometime in the next week regarding your buying experience here today and it's very important that we receive the highest ratings." Then you are

quirks.com/articles/2015/20150606.aspx

asked if they can "count on you" to respond with the highest marks in all areas. If you are bold enough to answer with anything other than a yes be prepared to have them try and change your mind.

You can be sure that attempting to influence participant responses prior to the survey is not part of any respectable measurement plan. Moreover, these measurement programs represent a considerable investment for any business implementing them. In addition to the cost of the survey program itself, there are often substantial rewards and other incentives tied to these programs. In the case of the automotive industry, manufacturers motivate dealership networks with both incentives and penalties based on survey outcomes. Equally important are the bragging rights that accompany consumer recognition, a staple in automobile advertising campaigns – "We've been voted No. 1 in customer satisfaction for (XX) years in a row."

To consumers, the whole process seems phony and leads to further distrust of the car-buying experience. Unfortunately it remains prevalent within the industry and is common enough that consumers are not surprised when it happens.

When it comes to customer satisfaction ratings, gaming the outcome is not unique to the automotive industry. In every business sector where measurement takes place, company representatives artfully game measurement systems in order to attain incentives and keep management happy, leaving the enterprise with only the appearance of being better than it truly is, at least on paper. For example, recently I was on vacation with one of the major cruise lines. On the last day of our cruise, in the ship's onboard theatre, where approximately 800 guests gathered, one of the crew members actually coached the audience on how to respond to the survey every passenger would shortly receive. "Extremely satisfied" for all measures was the message.

That said, it begs the question: What happens when a business allows its measurement of the customer experience to become distorted? In short, it can lead to failure of the business. Measurement is essential in today's ultra-competitive business environment. Keeping your measurement program authentic takes planning, oversight and awareness. All measurement initiatives start off aiming to keep the measurement fair and accurate but unless a conscious effort is made to preserve the customer as the central focus in all aspects of measurement, management and operations bias can slowly leach their way into the measurement program; undermining the original purpose of measurement goals. Many businesses have gone by the wayside thinking they were better at serving their customers than they really were.

Hurt the company beyond measure

Even with the potential for misuse, not measuring the customer experience should not be an option – you can put systems in place to maintain authenticity of measurement but not aggressively measuring how you relate to your customers can potentially hurt the company beyond measure. Keep in mind that every business is under the watchful eyes of its customers and they are continually measuring you subconsciously against internal expectations, your brand promise and the performance of your competitors. You are surely kidding yourself if you think for a moment that your customers will overlook even the smallest blemishes your business may have.

Therefore, it's imperative to honestly and continually measure the customer experience. The foundation for ongoing improvement is measurement. That said, there are plenty in the workforce who don't like being measured. Measurement introduces increased accountability and many would rather not find themselves being held accountable for something as nebulous as customer service. It's the way in which this accountability is handled inside the organization which ultimately determines if the business improves as a result of measurement.

Consider three ways employees and organizations may respond to the added accountability and pressure to improve as a result of measurement:

- Accept and constructively use measurement to improve areas of deficiency.
- Change the measurement instrument or criteria, effectively lowering expectations and inflating scores.
- Undermine the measurement process by focusing energies on score management rather than process improvement.

Constructive use of measurement leads to long-term growth and success. To be the best, organizations must identify and eliminate common corporate reactions to the increased accountability that comes along with measurement. Getting the most from a measurement program requires honesty, tenacity and integrity. If the goal is improvement, the focus should be real improvement, even if it's incremental, rather than meeting an absolute number. If the only measure of success is about hitting a score then a program becomes all about the numbers instead of the type of process improvement that ultimately provides tangible growth through genuine customer service. There is real value in measurement when authenticity is at the core.

Robert Sinclair is founder and president of Sinclair Customer Metrics, a San Antonio, Texas, research firm.

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

business-to-business research

‘Better to be vaguely right than precisely wrong’

What B2C can learn from B2B

| By Gerry Katz

snapshot

After decades working in both realms, Gerry Katz reflects on the differences between B2B and B2C research and explores some lessons B2B MR offers B2C researchers.

quirks.com/articles/2015/20150607.aspx

My career in market research began in 1972 and, like almost all market researchers, most of my clients in those first 10 years were manufacturers of consumer packaged goods (CPGs) – Colgate-Palmolive, Procter & Gamble, Bristol-Myers, etc. Although the business world hadn’t yet invented the term, today we call them B2C firms, i.e., business-to-consumer companies. What this meant was that my entire view of marketing and market research was framed by a world in which products were purchased, consumed and repurchased by individual consumers in a classic retail environment such as a supermarket, a drug store or a discount retailer. And in such a world, all products are mass-marketed using advertising, promotion, couponing and in-store displays.[1]

Although I didn’t fully grasp it back then, for a market researcher, that world had some wonderful characteristics:

- We operated in a data-rich environment. Although it was trivial compared with today’s big data, we could break down sales by individual SKU, geographic region and time period. And although it wasn’t easy, we could often relate changes in sales volume to specific marketing actions along similar lines. Over time, with the advent of panels, the data became even more detailed, to the point where today, we can often track the behavior of individual consumers.
- For most products, there were an almost limitless number of consumers, enabling market research to almost always be conducted with large sample sizes at acceptable costs.
- Because of this, we relied mostly on quantitative research. And because there was now sufficient computing power available – both hardware and software – the use of multivariate statistics such as regression, factor analysis, cluster analysis and multidimensional

scaling was now practical.[2]

- And when it came to concept or product testing, it was relatively easy and inexpensive to make up product prototypes. We could easily show respondents a concept board, a drawing or even a rough advertisement. And if we wanted to place the product, it was usually quite feasible to make up a few hundred units of a new soup, laundry detergent or shampoo.

Changed quite dramatically

But in the 30 years since that time, my world changed quite dramatically as I turned my attention to consumer durables such as lawnmowers and consumer electronics and to business-to-business products and services. These include things like commercial-industrial products, medical devices, business services and high-tech products and services.

The world of B2B has had to contend with a very different environment and a very different set of problems. And as they have learned to deal with them, there are now some valuable lessons that they are in a position to share with B2C companies.

It took me a few years to get a really complete understanding of how the world of business-to-business products and services is different from B2C. Up until the total quality management (TQM) era in the late 1980s and early 1990s, these types of B2B companies rarely did any market research at all. I can recall a conversation with a former engineer from Dow Chemical in the early 1980s in which he explained that he was the entire market research function at Dow, with a total annual budget of $125,000. And $80,000 of that budget was earmarked for one of the (then) Big Eight accounting firms, who provided a service in which they collected sales data from all of the major chemical manufacturers in confidence, just so that each of them would know their market share.

Here are a few of the biggest contrasts:

First, there is almost always a much smaller universe of potential customers to interview. And often, they have been seriously over-researched to the point where it is difficult to get their cooperation. For instance, in a project on implantable defibrillators, which are surgically placed into the body by a narrow physician specialist called an electrophysiologist, I learned that there are only 1,800 of these specialists in the United States. All of them are extremely busy, highly-paid people and most of them are quite tired of participating in market research. So if you want their participation, you're going to have to pay them handsomely. Even worse, for some products, e.g., oil and gas exploration, there may be as few as 25-100 potential customers in the world.

Second, defining who the customer is is usually far more complicated, requiring a complex sample design and set of screening criteria. Instead of demographics, which are pretty straightforward, we're going to need to deal with company characteristics (firmographics). And instead of just two roles – purchaser and consumer, who are often the same person – we're going to have to deal with multiple functions (sales, marketing, engineering, quality, manufacturing, technical support, etc.) on many different levels of the organization (executives, managers and workers) and in many parts of the supply chain (direct sales, captive distributor sales and independent distributor sales). And within each of these, there may be many different roles: decision-makers, specifiers, influencers and end-users.

What this implies is that it's going to be a lot harder and more expensive to recruit respondents for market research. There do exist online panels for some of these populations but the quality is usually quite poor. And, unlike with consumer panels, few people actually choose to opt in. Finding lists is often difficult and expensive and most do not include phone numbers or e-mail addresses. This means that recruiting is just about as hard as prospecting for new customers, itself a difficult and often thankless task.

Even if you can find the respondents, any kind of interviewing typically requires a much higher-level individual to conduct them. For instance, it often demands a

certain degree of professionalism, an understanding of many different kinds of businesses and the ability to understand and deal with complex technology and terminology. The kinds of people we routinely use for quantitative telephone surveys, e.g., students and part-timers, are often out of the question for B2B.

In short, this implies that we are going to have to learn to deal with much smaller sample sizes than we are used to in B2C. And this in turn will limit our ability to use statistics. Even much of the easy stuff such as significance testing often becomes impossible or impractical.

A few additional observations about the differences between B2B and B2C:

When it comes to understanding customer needs, we find it useful to look for both functional needs and emotional needs. And with almost any product or service, we find lots of both. However, we have long observed that in the world of B2C, the emotional needs tend to dominate, while in B2B, it's the functional needs that dominate. While many customers are able to clearly articulate their functional needs, some ethnographic observation is usually quite helpful. Unfortunately, there are often many more obstacles to conducting ethnography in B2B. For instance, hospitals are required to adhere to the HIPAA laws and most have their own patient's bill of rights to maintain patient privacy, respect and dignity. Of course, any product that is used for defense purposes is likely to require a higher level of security and may even require a government security clearance – in addition to the usual need to guard a company's trade secrets and strategic plans.

When it comes to concept testing, the B2C companies can present their concepts by simulating the kind of mass-marketing they will eventually use when they launch the product – animatic storyboards of video advertisements, print advertisements, Web site wireframes, mockup displays, etc. But in B2B, a sales rep is usually required to present and explain the product and to answer customer questions. So, in B2B research, the researcher must often simulate the role of the sales rep, adding a new kind of variability into the research.

And when it comes to prototype testing, the CPG companies usually have far fewer obstacles. They can make up small batches of the product for in-home testing at trivial cost. But not so for most consumer durables or B2B products. For engineered products such as cars, electronic products such as aviation control systems and technology-laden products such as medical devices, the cost can often be prohibitive, not to mention the regulatory requirements before testing such products on humans.

Learned many lessons

After living and working in this very different world, we've learned many lessons and found good ways to deal with most of these problems:

Perhaps the most important lesson – and biggest surprise – is that **small sample sizes are often OK**. As market researchers, the notion of precision and projectability are constantly drummed into our heads just as musicians are taught that, when it comes to playing in tune, "almost right is wrong." However, Professor Len Lodish of The Wharton School, one of my mentors and former colleagues, has long asserted that, "It is better to be vaguely right than precisely wrong." Indeed, in many areas of B2B marketing and new product development, precision is a luxury that we can get by without. Separating various measures such as importance and satisfaction into high, medium and low is often sufficient.

Looming over all of this is the empirical finding by Abbie Griffin and John Hauser in their 1993 paper[3] that 20 to 30 qualitative interviews is usually sufficient for identifying customer wants and needs. And as practitioners, we have found that, even in highly complex, highly segmented markets, we rarely need to go above 40 interviews unless we are talking about a massive global study in which we are forced to deal with many different languages.

Because of the impracticality of conducting large sample-size quantitative research, **we've had to rely more often on qualitative research**. As a primarily quantitative researcher, I found this to be almost insulting, as I had been quietly dismissive of focus groups and individual depth interviews for much of the early part of my career. But what I've learned is that good qualitative research often proves to be even more powerful than quantitative, providing far-superior insights for both product development and marketing. The PDMA's longitudinal CPAS study[4] has shown this to be true for many years now.

In many, many cases, **we can (and should) forget about statistical significance**. (For all of you quant researchers, please don't stop reading just yet!) Every researcher who has ever presented the results of a study has been asked, "Is that statistically significant?" (Of course, we researchers know that there are only two possible answers: "Yes" or "It's directional"!) One of my biggest pet peeves is that so many marketers focus too much on subtle differences between subgroups and lose sight of the overall. For instance, if sound quality in a movie theater is somewhat more important to men than it is to women but is still quite important to both, that latter fact to me is a more significant finding than the fact that bathroom cleanliness is far more important to women than it is to men but is less important to both. In short, companies should focus on the big stuff first and the (often subtle) differences second.

The concept of statistical significance is so often misunderstood. If we compare a measurement between Groups A and B and find that A is higher than B, all that a significance test is telling us is whether that difference is real or is a result of sampling error. And, depending on the significance level being used – usually 90 percent, 95 percent or 98 percent – it tells us the probability that, in fact, B might be higher than A – 10 percent, 5 percent or 2 percent. No matter which of these levels we use, the odds are pretty good that A really IS higher than B. If your research objective is precise forecasting or trying to prove a new drug's superior efficacy versus an existing drug, then a high degree of precision is absolutely required. But for most routine business decisions, we can rarely achieve this level of precision, no matter what we do. This is even more so for B2B products. And that is okay.

It's okay to reuse respondents. Good research practice argues that we should always seek out "fresh" respondents for market research, fearing that "professional" respondents are just doing it for the money and prizes and won't be objective. While this may be true, we often don't have the luxury of finding so-called fresh respondents in B2B. But what I have found is that serious, thoughtful research conducted with serious, thoughtful respondents almost always produces serious, thoughtful results. Therefore, going back to the good respondents for subsequent phases or subsequent studies is fine. In fact, people are often flattered that you want to learn more about their thoughts and opinions.

In recent years, the use of social media has become critical in the world of B2C. However, **social media usage appears to be moving much more slowly in B2B**. For instance, there are literally millions of dog owners who go online to talk about how they care for their dogs and what dog ownership means to them. They share their thoughts about dog-related products and services quite freely and ask for no remuneration in return. But plant managers, high-level executives and physicians don't have the time to do this and, even if they did, would probably be reluctant to do so for fear of leaking intellectual property or confidential information.

But in many ways, this is a case of "less is more." The problem for B2C companies is that the amount of content on social media is often overwhelming, forcing them to use artificial intelligence-based text analysis software to glean information. While the software is clearly getting better over time, most companies still do little more than to track positive versus negative sentiment about their products. Most of the people I've spoken to about their use of social media say that to glean really good information still requires human eyes and that means that we are forced to pick and choose from a very small part of the available content. For most B2B companies, the fact that the content is so limited means that they can follow most if not all of it.

In order to maintain some control over the content, many B2C companies have long maintained their own online communities. And some B2B companies have now done the same. For instance, Caterpillar has its own discussion group right on its Web site. Caterpillar owners share tips and ask questions of one another, while the company follows the discussion and occasionally chimes in with its own thoughts. Even B2B

companies with smaller, higher-level types of customers can create their own form of social media. They may have to incentivize people for their participation and the group may only be intended to last for a short time (perhaps a few days or a few weeks) but the results can be highly useful.

In our experience, the best use of social media in market research (as opposed to marketing) is that it gives us clues about what people are thinking and talking about – information that helps us to write better qualitative discussion guides and quantitative surveys, i.e., what to ask them about. And although there are still some disadvantages compared to traditional qualitative interviews for gathering voice of the customer needs, we can often infer needs from user-generated content at much lower cost, meaning that we can rely on fewer traditional interviews. Yes, these processes still require human eyes to read through the content. But taken together, we are usually able to achieve even better quality in less time and at lower cost.

Similarly, the use of big data has allowed B2C companies to revolutionize the way they market their products. It allows them to individualize their marketing based on information about individual customers: what they search on and what they buy. In the world of B2B, this is precisely what good sales reps try to do – to individualize their messaging, their behavior and the products and services they recommend or promote. So far, there is usually not much big data to go on but the concept of micro-marketing has always been part of the discussion. If and when big data becomes available in the world of B2B, then perhaps the B2C companies will be the ones who provide the best lessons.

No longer in the wilderness

To be sure, B2C companies still lead the way in terms of the sophistication they bring to the table in terms of marketing and market research. This will probably always be so. However, B2B companies are no longer in the wilderness. And in fact, they've learned a few things that B2C companies ought to pay attention to.

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[1]Of course, in addition to the end consumer, there certainly was a direct customer: the retailer. But we paid little attention to them back then, because all of the power was held by the CPG companies themselves and the retailers usually did their bidding. That power dynamic has completely reversed over the past few decades to the point where today, much more attention is paid to this part of the supply chain which is, in essence, a B2B relationship.

[2]I've always found it ironic that, while the mathematics of least-squares has been around for hundreds of years, it only became practical to actually perform in the last 50 or so with the advent of digital computers.

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Gerry Katz is executive vice president at Applied Marketing Science Inc., a Waltham, Mass., research firm. He can be reached at gkatz@ams-inc.com.

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••• online research

Check your assumptions at the door

10 things researchers need to know about the Internet of Things

| By Sean Campbell and Scott Swigart

snapshot

Why qualitative will be king and old-school industries will still matter in the age of the Internet of Things.

If you're involved in market research in a technology company or a company that's becoming more technology-focused (which is basically everyone), then you're probably hearing more and more about the Internet of Things (IoT). In fact, an IoT project may have already crossed your desk.

For a quick definition, the Internet of Things refers to devices that send data over the Internet. This could be a consumer device such as a smartwatch that's sending your heart rate and sleep cycle to the cloud or a business device like a smart power meter that, every minute, sends data on your power usage.

The analyst firm Gartner predicts that there will be 26 billion Internet of Things units by 2020.[1] Business Insider expects that by 2019, it will be the largest device market in the world, "more than double the size of the smartphone, PC, tablet, connected car and the wearable market combined."[2] In short, there will

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be far, far more "things" using the Internet than people.

In this article, we'll walk through 10 "truths" to bring you up to speed on this megatrend so that you can lead more effective research in this rapidly evolving (dare we say, exploding) space.

1. Old-school industries will matter

When people think of technical innovations, they often (rightly) assume that these will take hold first in Silicon Valley. But the truth is, many of the early adopters of IoT will be old-school industries such as manufacturing, natural resources and government. The reason is because these are capital-intensive segments in which efficiency is prized and they are ripe for "sensorification."

As an example, it's expensive to inspect thousands of miles of oil pipelines. But pipelines can be instrumented with sensors that can instantly detect a pressure drop in one section, indicating the precise location of a leak. This allows faster response and limits the impact on local communities. As another example, a modern GE locomotive has "more than six miles of wiring and 250 sensors generating 9 million data points every hour to run as efficiently as possible." [3]

And in government, the term to watch is "smart city," which includes monitoring of parking, roads and traffic, noise, crime, the environment and more. Already cities are filling up with license plate readers. [4] Citizens and leaders will soon have more data than was previously imaginable.

So when you're thinking about markets and segments, be prepared to look at industries that have historically been laggards in technology adoption. Don't leave out manufacturing, mining, government, insurance, energy or agriculture.

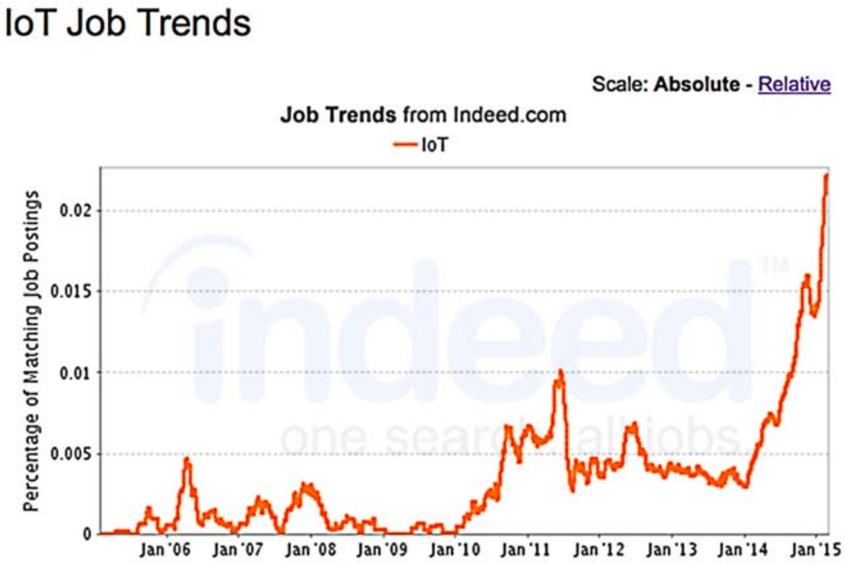
2. All that hardware is really about software

While the nerve endings of the Internet of Things will be hardware sensors, the real value is going to come from software. Each sensor will emit a steady drip of data but for the most part, sensors will be designed to be cheap, replaceable and really only so smart. The drips of data they emit will aggregate into a raging torrent of information that must be stored and analyzed, sometimes in near real-time. That's going to require staggering amounts of processing power and a lot of code. If you want to understand the use cases, you'll want research to focus on the person cranking out that code (or the software architect they serve) more than on the person holding the soldering iron.

3. It will live in the cloud

IoT will go hand in hand with cloud computing, big data, streaming analytics, machine learning and data visualization. Since the IoT sensors will be Internet-enabled, they'll usually be sending data to, and receiving commands from, the cloud. Cloud vendors like Amazon Web Services, Microsoft Azure, IBM BlueMix and others will be huge beneficiaries of this trend. These services will let start-ups get off the ground without huge capital investments, let them "pay as they grow" and let them hone their business models and algorithms.

Figure 1



4. There will be three enormous markets

Much of the press regarding IoT focuses on wearable technologies, smart thermostats (such as Nest), home security and (for reasons we don't understand) smart refrigerators. But the consumer market will be dwarfed by business and government uses. Outside of the old-school industries mentioned earlier, the possibilities for supply-chain optimization, warehouse instrumentation, remote monitoring of in-home health care, energy-efficient buildings, smart retail, fleet management and many other enterprise use cases are enormous.

When constructing research, the place to start is to investigate where existing business processes could be greatly enhanced through instrumentation and intelligence. For example, how could a fleet of delivery vehicles provide intelligence and improve efficiency if they were "sensored up"? Then consider investigating completely new paradigms that will only be possible on an Internet of Things substrate.

5. Look more at landscapes than at individual players

Let's face it: we're in the "gold rush" days of the Internet of Things. Players are going to rapidly come and go. Consolidation hasn't even started. What's most important at this stage is to understand the topology of the landscape. Think in terms of markets rather than specific players. The playing fields aren't going to change as fast as the teams.

Much of the research opportunity, at this stage, will be focused on investigating entry into a market and a broader view will be critical.

6. Today's customers are not tomorrow's customers

And today's partners are not tomorrow's partners. Case in point: John Deere has APIs in a program that software developers can join. [5] Let that sink in. That means that some of John Deere's new customers are programmers. While we pine away for self-driving cars, self-driving farm equipment is already here. Drones will take over crop dusting. [6] Robots will replace security guards. [7] Do you think the corporate campus facilities department has ever dealt with a lot of robot vendors? There are going to be huge amounts of learning and figuring out on both the buyer and seller side as customers and vendors touch for the first time.

When constructing research studies, be prepared to throw out all assumptions of who customers, partners and vendors are. Historical norms will limit you greatly here.

7. Qualitative research will be king

We are very much in the discovery phase of this trend. Everyone is still trying to figure it out. A quantitative survey instrument would be built almost entirely from guesswork and respondents will likely not even understand the questions or interpret them the same way the researchers do. The high-value research will be qualitative. It's going to come from in-depth conversations about use cases. What are people trying to do? How are they trying to do it? What have they learned along the way? What unexpected problems or benefits did they experience?

8. Partners will know the most first

Customers aren't that knowledgeable yet. Vendors will hope to have guessed right when making products.

Imagine you want to understand the market for the Internet of Things for high-rise energy efficiency. You could conduct interviews with end customers who have had such systems installed. In your research you could learn the triggers for making this investment, find out which vendors they considered and hear how the implementation went. That would all be great research but each customer would only know their one and only case.

Now imagine including partners in your research who had each performed a number of implementations. They could go beyond the one-customer experience and talk about what's driving buyers in general and what really resonates with them. They could talk how they've stitched products together from multiple vendors to make a complete solution. They could talk about what's lacking in products today and where they see opportunities. Because of their experience, they will have steered around pitfalls that the end customer was never aware of.

In the early stages, customers are going to be looking for partners to be trusted advisors and for a very good reason – the partners performing the implementation will actually be the most knowledgeable people in the value chain.

9. This stuff (mostly) isn't going to be secure

The market will be dominated by 800-pound gorillas like Cisco, Microsoft, Intel and GE but also by start-ups that didn't exist three years ago. The big vendors will do a good job with security. Cisco has been building secure network devices, since, well, before there was an Internet. But the start-ups will be where much of the compelling innovation happens. And building something secure is much more expensive than just building something that works. Most of these start-ups will be deliriously happy to simply get the kind of market share that makes their device worthy of cyberattack.

As a result, the security aspect should be a component of many research projects. How much do buyers in a sector really care about security? And if they say they care, does that concern actually seem to show up in purchasing behavior? These are all good questions.

10. Look for quantitative data that's a real leading indicator

There are times when you can run a quantitative survey and there are times when you can just ask the Internet. For example, consider the graph in Figure 1. This data comes from Indeed Trends, which will simply graph how frequently a term shows up in all the job postings (millions) that it indexes. We've found that job postings are a good leading indicator for a trend, especially a technical trend.

Here's another: Want to know which large companies are making the biggest Internet of Things investments? Do a LinkedIn search of how many individuals mention IoT experience in their profiles, sorted by company, and you'll see a list of firms like IBM, Intel, Cisco, Microsoft, etc. This kind of data abounds, can be very cost-effective (read: free) and provide substantial early insight. It doesn't replace quantitative research but it can augment quantity and quality in powerful ways.

Would have scoffed

If, in 1995, if you had said that the Internet was going to disrupt most industries, many would have scoffed. In fact, many did. But looking back, what do we see that was untouched by the Internet? Virtually nothing. Blockbuster was blown away by Netflix. Kodak lost to the digital camera and instant photosharing. Encyclopedia Britannica fell to Wikipedia. Amazon crushed bookstores and then others in retail. Uber and Lyft are taking on taxis. How did you buy your last plane ticket? Or insurance policy?

The Internet of Things will cause a similar reconfiguration. The spoils will go to those who figure it out first. And it's the trend that's launching a thousand research projects. Hopefully, this article has helped put a few more things on the checklist for your next IoT research project.

Sean Campbell is CEO and Scott Swigart is president of Cascade Insights, a Portland, Ore., competitive intelligence firm. They can be reached at sean@cascadeinsights.com and at scott@cascadeinsights.com.

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••• research technology

Mobile marches on

Highlights from the FocusVision 2014 Annual MR Technology Report

| By Tim Macer and Sheila Wilson

snapshot

This installment of the long-running study of tech in MR found some interesting regional differences in the use of various techniques.

Now in its eleventh year, the annual marketing research technology survey has a new sponsor, FocusVision, though it is still carried out by meaning ltd, so it draws on the previous decade for the tracking data it presents, while continuing to explore new and topical areas of interest on the technological side of marketing research.

Among the trends revealed this year are that research worldwide now embraces more different interviewing channels than ever before and some of the more high-tech – but until recently, lower-volume – modes are now on the rise.

The influence of mobile is also starting to affect most firms. We made this one of the three topics we explored more deeply 2014, along with how firms are coping with rising demands for more data visualization and dashboards on the delivery side and another intriguing area – the rise of shadow IT and, more generally, IT that research companies find they are using, rather than planned to use.

Fieldwork was carried out using FocusVision's Decipher platform in December 2014 and January 2015, among 230 research companies worldwide. It is a 15-minute online survey that speaks to those responsible for or influential in technology decisions within research companies. For 2014 it was again translated into French, German, Chinese and Japanese.

We are most grateful to our sponsor, FocusVision, for their generous financial and technical support and to all of our survey participants, who have also been generous with their time and candor.

Research modes offered

One of our key trackers follows the interview technologies or modes that research companies are utilizing. Figure 1 clearly shows how the sands are shifting – the less high-tech modes, paper and CATI, are on the wane, whereas newer and more high-tech modes are either holding their ground or growing.

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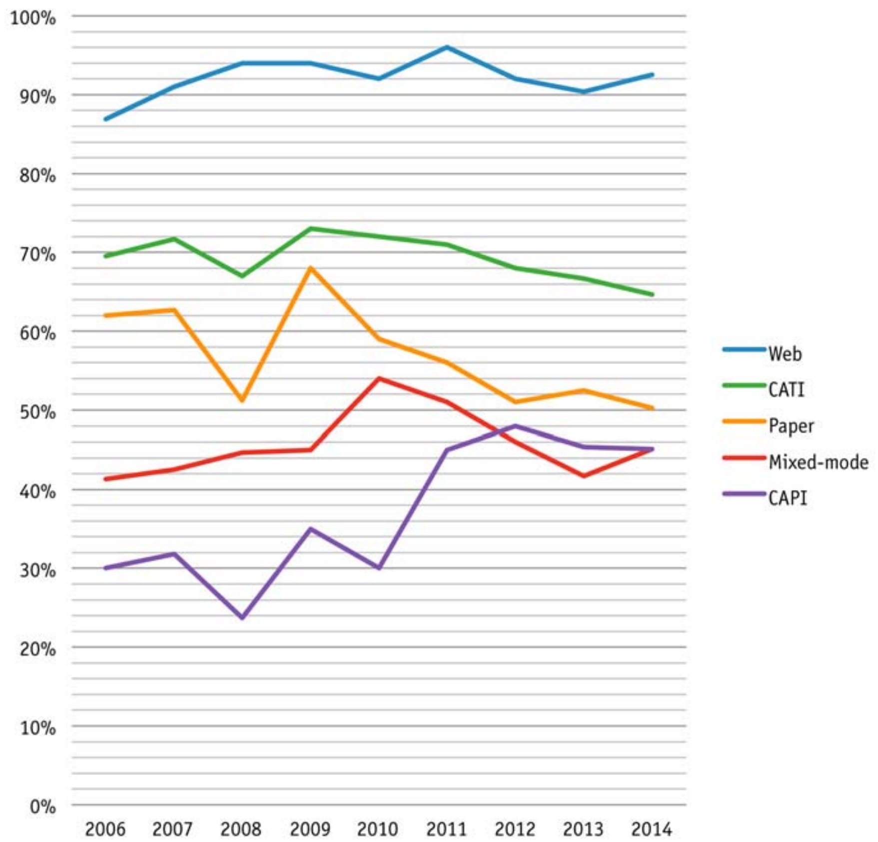

Figure 1: Research modes utilized by research companies since 2006

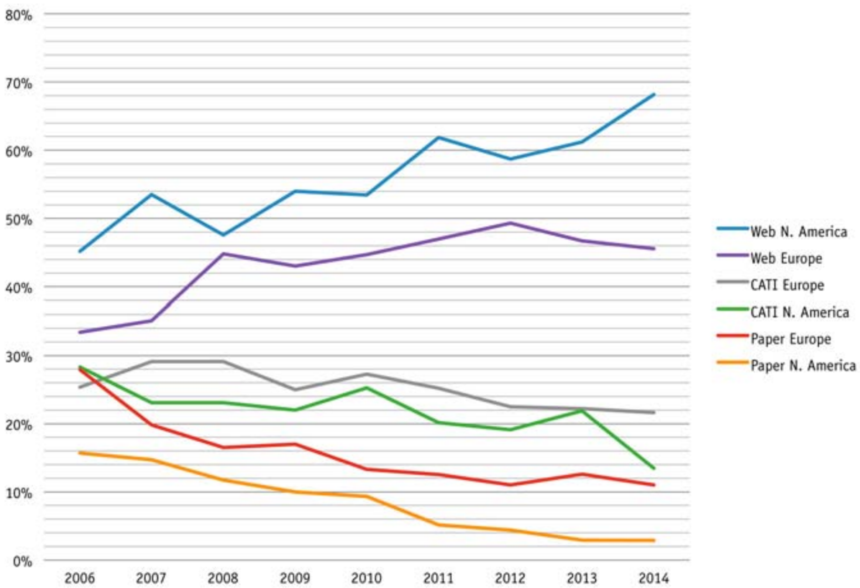

Figure 2: Interview volumes by mode – Web, CATI, paper volumes compared, North America and Europe

Web is dominant around the world or at least in the parts we survey. Looked at regionally (not shown in the charts), CATI now a distant second, at 57 percent, while it is still mobilized by 72 percent of companies in Europe. Web in both regions enjoys 95 percent utilization.

The downward trend in CATI is strongest in North America. In 2006, 74 percent of North American companies were doing CATI but by 2014 this was down to 57 percent. Europe, however, shows little change: 68 percent in 2006 and 72 percent in 2014.

We also have data that shows the volumes of business that each mode generates within each company. While the utilization chart tracks a rapid rise in CAPI, volumes are still low, although they have doubled from 5 percent in 2006 to 10 percent in 2014.

CAPI is making inroads at a time that those two industry mainstays of CATI and paper are in decline. One-half of companies still utilize paper and nearly two-thirds (65 percent) CATI. With the development of tablets, smartphones, improved data handling on mobile networks and increasing availability of Wi-Fi, CAPI is becoming a more realistic option.

CAPI and paper are important in Europe – both are used by over half of companies in Europe but under a third in North America. This difference is probably due to greater diversity in market conditions and culture in Europe, although we do expect to see a drop in pen-and-paper research in Europe.

Every year, we ask our participants to consider their quant work and estimate the proportion of it that each mode represents. In Figure 2 we show the North American and European data for Web, CATI and paper. The results show that the North American marketplace is still, after all these years, gravitating towards the Web.

The volume of Web research in North America in 2014 (68 percent) has grown steadily since we first measured it in 2006 (45 percent). Furthermore, the picture in North America can now be described as Web first, CATI a poor second (13 percent) and then half a dozen other modes that account for the other 18 percent, with none taking more than a 5 percent share. Paper is no longer a major mode in North America because the amount of research conducted with pen and paper is now close to eliminated – as recently as 2006 it still accounted for 16 percent but by 2014 it is down to 3 percent.

The trends are similar in Europe but not as pronounced, with Web and CATI accounting for 67 percent together and paper still clinging on to 11 percent.

Trends in the minority modes

Focusing on the more rarely-practiced modes (Figure 3), we have noticed that there is lots of recent growth in all things mobile – and this appears to be across the world, not just in North

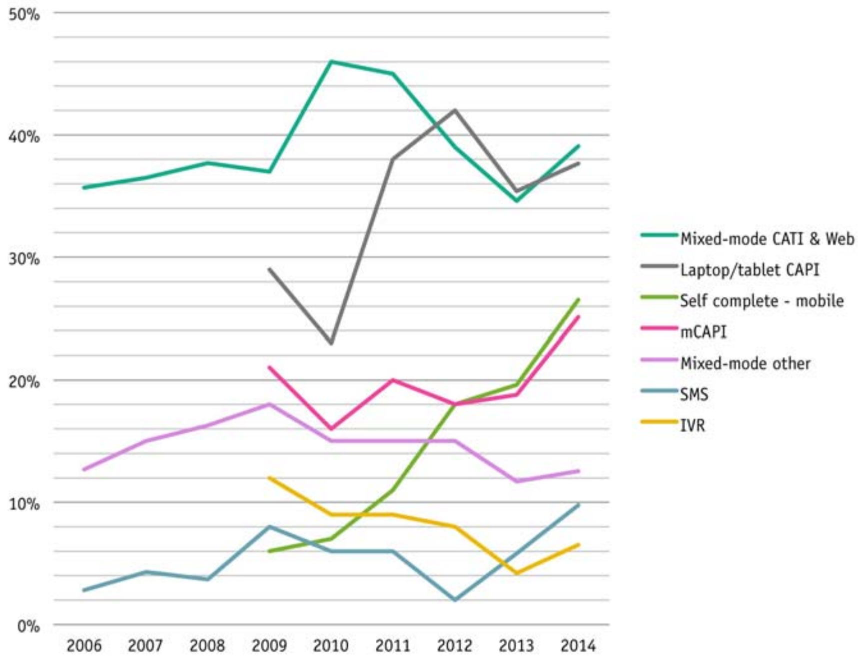

Figure 3: Research modes offered – trends in the minority modes

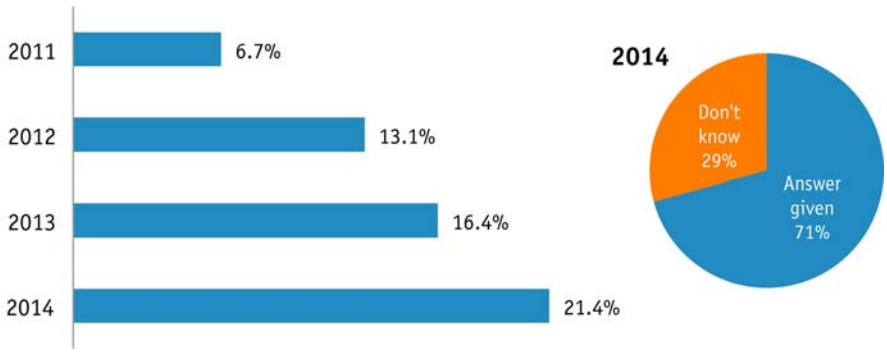

Figure 4: Proportion of Web survey participants attempting to take these surveys on small-format mobile devices such as smartphones

America. When we first looked at the proportion of companies offering "mobile self complete" (i.e. online research specifically designed for smartphones or other mobile devices) in 2009, 6 percent of companies provided this service. Just five years later, this has surged to 27 percent.

Volumes for mobile are growing too, albeit from a tiny base – 1 percent of total quantitative work in 2009, 3.6 percent in 2014.

We also think CAPI is showing signs of a renaissance in the form of mobile CAPI (mCAPI). With the widespread availability of cheap consumer tablets and greatly improved support for data by the mobile networks, mCAPI makes perfect sense for face-to-face. The proportion of companies including this in their portfolios has increased slightly in 2014.

Even SMS research is showing signs of life. But we question why interactive voice response (IVR) is languishing at the bottom of our chart.

Many other industries use IVR widely, including our close cousin, customer service feedback management, so why not market research? It would seem ideal in combination with other technologies such as CATI, on many topics where smart voice prompts can finish off the interview once rapport and trust have been established – avoiding the cost of and away from the moderating effects of the interview. Is the research industry missing a trick?

Mobile participation in Web surveys

For the last four years, we have been asking companies how many of their survey participants are attempting to take Web or online surveys on smartphones and other mobile devices. It has risen progressively each year from 6.7 percent in 2011 to 21.4 percent in 2014 (Figure 4). There are more accurate measures of volume, including one recently published by the survey's sponsor, FocusVision, which put the number of survey starts across the 74 million surveys fielded on its Decipher platform in 2014 at 7 percent for panel surveys and 22 percent for surveys using client-provided sample.[1] However, the upward trajectory it reports is closely mirrored in what research firms report to us.

What is revealing is that many companies found the question too difficult to answer, with 29 percent answering “don’t know” – which is slightly down from 2013, when 37 percent gave no answer. To us, this is essential information anyone involved in supporting online research should know.

Go to a conference or read any of the research discussion groups and you will find people are increasingly talking about the need to take a “mobile first” approach to online survey design. This is because, given current trends, in a few years’ time a majority of survey starts will be on a mobile device. So this year, we delved further to see how proactive research companies are in designing for mobile in their online studies.

We asked companies “How often would you say that the question of dealing with survey participants on mobile devices is discussed when designing online research projects?”

Overall, as shown in Figure 5, companies split almost 50/50 between those who mostly do (48 percent

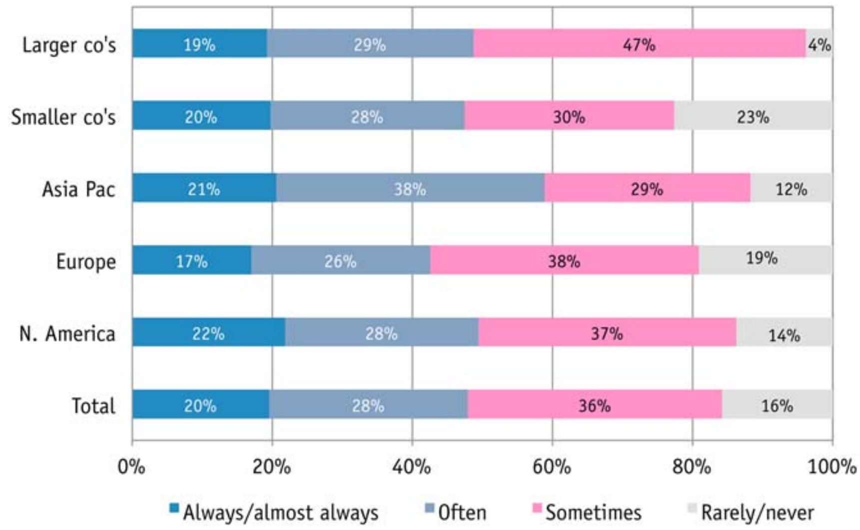

Figure 5: How often is the question of dealing with survey participants on mobile devices discussed when designing online research projects?

“always” or “often” discuss this) and those who mostly don’t talk about mobile when designing their online studies (52 percent report “sometimes” or “rarely/never”). Only one in five routinely take it into account.

There was no difference between larger and smaller companies in terms of those actively talking about it, but more smaller companies were likely to ignore it altogether. It’s talked about most in Asia-Pacific (59 percent “always” or “often”), yet is less likely to get consideration in Europe (43 percent).

Other questions (which you can read about in detail in the full report) probed how the extent to which their online surveys are now mobile-friendly and how good the survey platforms they used were in creating mobile-friendly versions of online surveys. A similar division emerged there too.

Two-thirds of firms report they support mobile in many or all of their surveys, with support more prevalent in North America and among larger firms. However, the smaller firms have the edge on taking a mobile-first approach: 36 percent of smaller companies say all of their surveys are now mobile-friendly, against 22 percent of larger companies and 31 percent overall.

Technology does not seem to be the barrier here: 29 percent of companies reported the software they used made it “very easy” and 42 percent said it was “moderately easy” to create online surveys that were also mobile-friendly. Interestingly, 10 percent did not know – a high number compared to other questions in this study. It again reveals the extent to which the topic is still not high on everyone’s agenda.

Technology by stealth

Another emergent trend in the wider field of corporate IT is the rise of what is sometimes called “shadow IT” or “stealth technology” – something that IT managers are increasingly worried about. This is where individuals or departments bring in their own technology devices and connect them to the network or buy their own software, which they either download from the Internet or simply subscribe to as a cloud-based service paid for on the company credit card.

For research companies, the pressure to use technology not chosen centrally by the company is even greater, as both research suppliers and in some cases clients too are twisting the arms of researchers to use their own systems for sampling, fieldwork administration, data collection or, in the case of clients, to distribute and report results.

We asked what “additional” technology resources the company made use of and listed 10 specific kinds of usage, plus “something else,” which we have grouped in four categories.

This reveals that using other people’s technology is very common across research companies of all sizes. In total, 82 percent of firms report they use software that is owned or con-

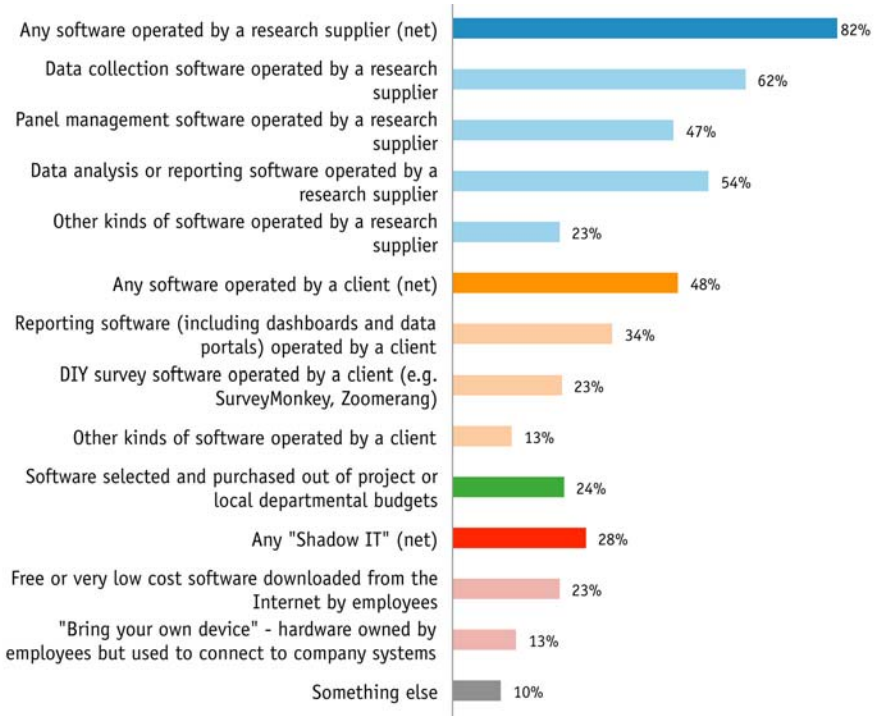

Figure 6: External technology and shadow IT in use at research companies

trolled by a research supplier – data collection platforms being the most common – and 48 percent use software controlled by their clients, with reporting software most frequently referenced (Figure 6).

Actual shadow IT is mentioned by 28 percent of firms. It comes ahead of the more official equivalent: software selected and purchased from a departmental budget, which 24 percent report.

We also asked about policies and attitudes towards using external technology and shadow IT and found a very mixed bag of responses, with many firms nailing it down through policies and procedures but a minority leaving it to good fortune.

This is not just about challenging the status of the CTO or IT manager. It is also about knowing where all your data is and ensuring that both commercial confidentiality and personally identifiable data are properly protected, which is hard to do unless good controls and policies have been put in place. It is a fundamental requirement of every research firm to know where its data is and who has access to it. We know this is not always achievable but there is no excuse for unintended release of confidential data and we are not confident that research companies are doing all they need to to manage this risk.

Dashboards and data visualization

The appetite for dashboards and more graphical ways of presenting data among research buyers shows no signs of diminishing. But we know from when we asked about this in 2011 that companies were under strain to deliver these more exotic kinds of output. Three years on, we wanted to see if things had changed and hoped to isolate where the problems lie.

For 2014, we ascertained that graphical reporting is very common among companies as a delivery method. Each firm was asked the percentage of projects they deliver that require each of four different kinds of visualization methods – we have simple-averaged those percentage values here:

- Static charts or graphs presented online: 37%
- Online dashboards that include some data visualization: 27%
- Interactive charts presented online: 18%
- Custom infographics in reports or online: 15%

We then probed to see how difficult companies were finding it to satisfy client demands for each and discovered that there is still quite a lot of pain involved (Figure 7).

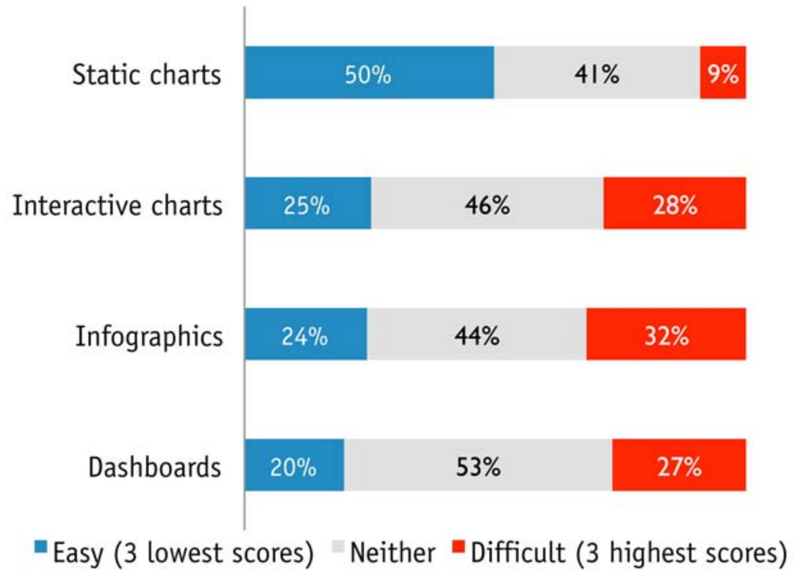

Figure 7: How easy or difficult research companies find it is to provide different forms of data visualization

With the exception of static charts, more firms found each of the other methods difficult rather than easy. The question was a 10-point scale, calibrated from 1 for easy to 10 for difficult.

We probed into the specific difficulties with dashboards. Top of the list was not enough budget, followed closely by the need to customize the software to handle dashboards (which is another cost consideration) and lacking the in-house skills.

However, skills is one area in which there is a noticeable shift in the last three years.

We asked who was involved in the production of data visualizations in both years. Not surprisingly, researchers are involved in most cases, but beyond that, the picture has changed dramatically between 2011 and 2014 (Figure 8).

In 2011, after researchers, it was research assistants, DP and IT specialists and charting specialists that followed. Come 2014, the second place now goes to graphic artists. However, DP and IT specialists are in third place – and this is not surprising given that much of the preparatory work involved in getting data ready for visualization depends on getting the data into an amenable format to work with. In 2011, very few firms mentioned visual designers either but the number has doubled since that time.

Figure 8 illustrates another point: that data viz is a team effort, as it calls on a lot of different people with

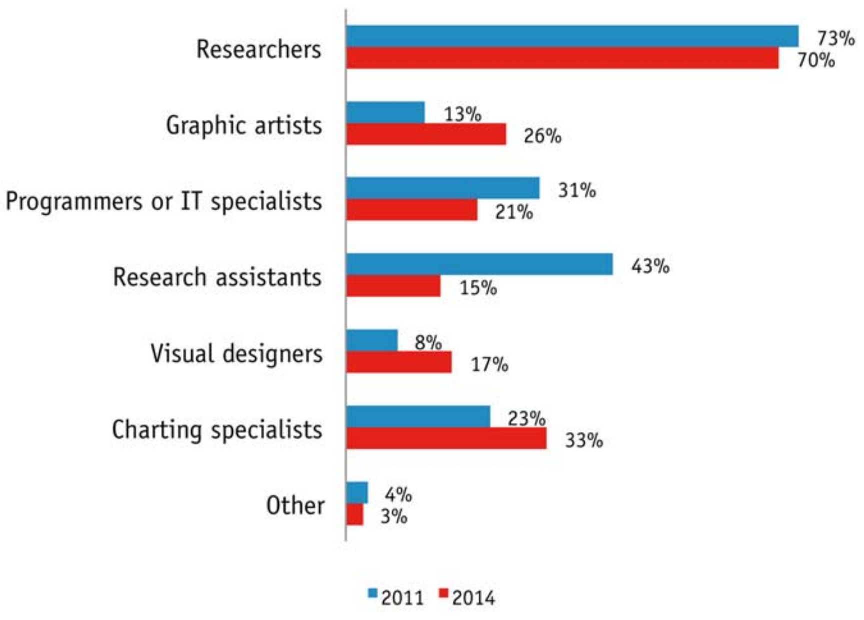

Figure 8: Who typically produces any data visualizations required?

a lot of different skills. The ideal combination is probably the researcher (to identify the story), the IT specialist (to get to the data) and the designer (to lift both to the next level). Overall, the balance of skills reported in 2014 looks a lot more healthy than it did in 2011 and more conducive to producing a higher quality product too.

In another question, we probed into the technology being used and this again shows there is unmet need in the technology being used. However, this is not surprising since few firms report that they actually use any specialist software and a worryingly large number seem to expect a combination of PowerPoint, Excel and a crosstab package to be up to the task. In the area of data visualization, the industry seems to be upping its game on the skills front but not with its technology. We are hoping that's what comes next.

Tim Macer is managing director and Sheila Wilson is an associate at meaning ltd., the U.K.-based research software consultancy that carried out the study on which this article is based. They can be reached at tim@meaning.uk.com or at sheila@meaning.uk.com. The FocusVision 2014 Annual MR Technology Report can be downloaded by visiting meaning.uk.com/technology-survey.

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the business of research

Hope for the future

Why the research industry has reasons to be cheerful

| By Tom Ewing

snapshot

The author charts six changes he has seen in marketing research over the past 15 years that have him optimistic about MR's ability to evolve and improve.

This article is based on a keynote speech that was originally given at the Australian Market and Social Research Society (AMSRS) annual conference in Sydney last year. When the AMSRS kindly invited me to give a keynote, they had one condition: it had to be upbeat. Keynotes at market research events often have a rather depressing air – constantly stressing the research industry's need to change, to become more like consultants or technicians or entrepreneurs or else face extinction.

Market research is far from perfect, of course. But those gloomy prescriptions have one thing in common: They assume that research can't change or is slow to do so. Except it can. In the 15 years I've been in the industry, research has changed enormously and that change is ongoing. My AMSRS keynote was a celebration of that change and of an industry with a marvelous capacity to change and adapt.

Even optimistic overviews of market research tend to talk in terms of its future – the promised land that awaits the industry if we just embrace big data/become trusted advisors/get into wearables (insert your own urgent action here). What I wanted to describe wasn't the future of research but its present – the day-to-day reality of forward-thinking research companies. As Ian Dury put it in his song "*Reasons To Be Cheerful*": "Yes, yes my dear/perhaps next year/or maybe even now." Why wait?

I identified six main changes I saw happening in research – compared to 1999, when I started my career. A couple of the changes have been wider trends that research has found itself forced to react to but most of them are the research industry seizing its opportunities. Research today is regularly using new technology or scientific understanding to improve its practices and invigorate its assumptions.

The six changes cover all elements of research: its approach to measurement, its assumptions about behavior, its desired outcomes, its style of deliverables, its treatment of participants and the client goals it helps to reach.

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

For a long time, the research industry's main model has been proprietary metrics – black-box scores created by smooshing together bits of attitudinal data into a single score, then building a norm out of it. Proprietary metrics offer an illusion of the concrete – you can see how well what you're testing compares to decades of history.

These metrics were a necessity in a world where we didn't have access to data about outcomes and real behavior. But increasingly brands do have behavioral data: from transactions through searches through locations, much of the information discussed under the umbrella of big data is behavioral. This doesn't end the usefulness of proprietary metrics based on attitude but it puts them into particular niches – explaining the "why" behind the "what," for instance. It's getting easier to compare predictive metrics to outcomes and it's getting easier to use behavioral data as the basis for decision-making and experimentation.

Attitudinal metrics can still be successful – look at Net Promoter Score (NPS), an extremely simple attitudinal metric whose take-up has been so dramatic that you could almost forget it doesn't measure actual recommendations and conversions. NPS has the virtue of simplicity but it's also essentially an open-source metric: Even if you're not using the official NPS metric, you can customize and insert a measure like it very simply indeed, then analyze it against whichever outcomes are most useful. This agility isn't shared by most proprietary research models, to put it mildly. It's likely in the future that simple, agile metrics like this will be more important to research than new black boxes.

Behavior: from claims to context

The rise of behavioral data is a trend research has had to respond to, rather than one of its own making, but it is responding. The "world without questions" is becoming more of a reality. When we have more access to behavioral data, research's role becomes less about establishing claimed behavior (past, present or future) and more about putting that behavior into context so clients can make informed decisions about it.

This is where the recent industry interest in behavioral economics and decision science fits in – it establishes the crucial psychological context of the decisions people make, without which they are difficult to understand and influence.

Interest in decision science has been criticized or belittled in some quarters – people point out that most of the basic psychological principles behind it have long been known and that the foundational behavioral economics work researchers have drawn on is itself decades old.

These criticisms are misguided. When a psychological principle was discovered is hardly relevant, compared to when it is effectively used. And while we have known for a long time that, for instance, granular behavioral data is highly unreliable, this has mostly been accepted as something we can't do much about: in aggregate, or over time, the errors are less important. But the rise of behavioral data holds out the possibility, at least, of looking at both individual and networked behavior more closely and it's grounds for optimism that researchers are taking that opportunity.

What does studying decision context actually involve? Not asking questions. The massive U&A survey, studying claimed behavior in obsessive detail, is a dinosaur method. But contextual research can involve quantitative measurement – often getting at implied context by measuring or manipulating decision times. Implicit association testing – now widely used by researchers – works by comparing the tiny differences in response times to different stimuli. Research Through Gaming's Betty Adamou collects response-time paradata in her "research games." And companies are using time limits to prevent considered, overly rational thought in research respondents – BrainJuicer has had success doing this in pack testing, for instance.

But looking at decision context is often a highly qualitative process and may not involve participant research at all. Literature reviews of existing psychology, sociology and economics work are becoming an important part of the research toolkit: much better to spend a few days on desk research than a few weeks simply confirming what is already well-known. "Field trips" to study decision environments are another tool and increasingly research agencies are hiring people from design backgrounds who can analyze user experience.

Even when participants are directly involved, it's often via mobile ethnography – we get a sense of the decision context by seeing and understanding the world around it and what other people are doing.

Outcomes: from hypotheses to experiments

An increased focus on the context of behavior gives researchers better opportunities to change it. Research has always been about using data to generate hypotheses and recommendations for its clients. Increasingly, though, innovative firms are going a step further: We can test those hypotheses ourselves.

The endpoint of a research study doesn't have to be a survey or qualitative work – it can be (and often is) a real field experiment in a store or a program of split-testing to measure the impact of online changes.

For example, last year BrainJuicer worked with DrinkAware to help understand and tackle binge-drinking in British pubs. (DrinkAware is a charitable organization funded by the British drinks industry which aims to encourage responsible drinking.) Our specific brief was to increase water consumption – British bars and pubs have by law to offer free water but this is a rare choice next to alcoholic drinks. DrinkAware's hypothesis was that if people would drink more water they would slow their rate of drinking alcohol. Our job was to get them to do that.

We looked at the way water was served and the typical behaviors around it and came up with two very simple activations. One was making water more visible – bottling tap water at the start of the night and placing it in a prominent basket on the bar. The other was use of a poster, simply reading "FREE WATER AT THE BAR" and with a close-up picture of a man drinking from a glass of water. The poster was designed to activate mirror neurons, parts of the brain related to copied and learned behavior. Mirror neurons activate in similar ways whether you are performing an activity or only seeing it and we hypothesised that triggering them with the poster would further increase water consumption.

To measure the effectiveness of the interventions we constructed an experimental framework based on a control period (with no interventions) and then alternating on-week and off-weeks where combinations of the two interventions were in place. We measured water consumption levels by a combination of counts of the free bottles, manual counts of water drinkers at fixed times, till receipts (for paid water, soft and alcoholic drinks) and other behavioral metrics.

What we found is that the interventions did indeed increase water consumption dramatically – a 320 percent increase in water consumption occasions. Unfortunately, the original hypothesis was not supported, as this level of increase did nothing to slow the rate of alcohol consumption.

The study is an example, though, of how a test-and-learn mentality is spreading through the research industry. The interventions could simply have been left as recommendations – the fact that we tried them and, by trying them, learned that increased water consumption didn't solve the underlying problems was far more valuable.

Deliverables: from findings to prototypes

As well as going the extra mile in testing hypotheses, researchers are putting a lot more effort into making deliverables more exciting and more likely to be acted on. Like everyone else, research clients – and their internal clients – make decisions led by the emotionally-driven System 1. If you produce deliverables that aren't just a list of findings but that make people feel something, the chances of them being shared and gaining a life within the client organization are far higher. The end of a project should only be the start of a piece of research's life. But after bringing them into the world, we researchers used to abandon our "babies" and leave them exposed to the sometimes hostile environment of the client business.

These days we are better than ever at presenting research in ways that give it a chance for survival. Some aspects of this have been much-discussed in research circles already. Infographics, for instance, are now a well-understood tool for research and marketing communications – even if researchers aren't always especially good at designing them! Dashboards – presenting information in close to real time – have proven to be something of a research speciality, with the likes of Face Research building social media monitoring tools that compete with well-funded specialists like Radian6.

One area that is less discussed in

this move from storytelling to story-doing is the world of prototypes. Rather than simply recommending what to do, researchers are often building it. After all, if your job is to test and optimize something, the logical output of that job is an improved version of the something. So you can find research agencies producing edits of ads, model packs, prototype app and Web page layouts and plans of retail concepts. These aren't meant to replace any of the finished work creative and design agencies do. Instead, these post-research prototypes are mock-ups designed to give research findings a fighting chance of capturing the imagination and emotion of the client.

Participants: from exploitation to collaboration

One of the most talked-about shifts in research practice has been a change in how we think about and talk about respondents. In the bad old days – when I began my career – our relationship with participants was nothing to be proud of. U&A surveys would routinely run to several hours and highly repetitive tasks – from conjoint to attribute grids – were the norm. Once such surveys moved online, people who took the – frankly understandable – decision to speed through them were kicked out. But beyond that, not much consideration was given to how these techniques might affect the data we got from participants.

This has changed. The drive for more humane and entertaining treatment of participants, spearheaded by the Research Liberation Front in the late 2000s and carried over to mainstream research by the likes of Jon Puleston and Annie Pettit, is transforming the look and feel of quantitative research for participants. Whether this will ultimately reverse the fall in response rates is unknown but it's heartening that the work is being led by researchers who passionately believe in rigor and high standards. It defangs the common objection to more enjoyable surveys – what if this affects the results? – by daring to say that if it does, maybe the results were wrong in the first place.

Meanwhile in qualitative research, we've seen a similar shift towards more interesting research environments – this time driven by new methodologies. The rise of MROCs and mobile ethnography is often talked about in terms of how well the methods let researchers get close to the authentic voice of the customer. Left out is the way in which accessing this authentic voice is more interesting and rewarding for the people taking part. Just as in the quantitative world, research is putting itself on a more collaborative footing with participants. Since – even with a move towards contextual and behavioral research – there will always be a need for some direct consumer involvement, this is definitely a good thing.

Goals: from information to emotion

Finally, the more we understand about how the mind works, the more the aim of research shifts.

Researchers used to be two-way information brokers. They collected data and told clients what their customers thought. But they were also in the business of helping clients communicate that information to those customers, by way of brand- and communications-testing tools that took an explicitly rational view of communications and persuasion.

This information-centric view of communication has regularly been attacked by marketing scientists and psychologists but recently it's been coming under more sustained and effective fire. From behavior change – where lecturing people is an obvious but poor solution – to advertising – where work by Les Binet and Peter Field (*The Long and the Short Of It*, 2013) proves the efficacy of emotional communications, it's becoming clear that feelings trump reasons and seduction beats persuasion.

This changes the goal of research – ways of accessing and understanding emotion are becoming more and more important. Some use existing, highly validated systems of human emotion, like Paul Ekman's seven basic emotions. Others tout the benefits of new technologies, like facial coding. But more than ever, the research industry is finding out at a primal level how people feel about brands, ads and ideas – and then helping clients make things that make people feel good.

Completely unrecognizable

The overall impact of these changes is huge. The work I'm doing now at BrainJuicer, and the work a lot of other agencies are doing, is completely unrecognizable from the work I was doing in 1999. And if I had to sum up the changes in one sentence, it would be that research has got a lot less self-centered over the last 15 or so years.

It used to be that the result was king. Consumers existed to produce data that could be turned into results. You delivered those results to your client and that was generally the end of them. If consumer behavior was messy or difficult to understand, then you smoothed off the edges. It was a system that worked. But it was selfish. Its understanding of behavior stopped at the survey question. Its understanding of business stopped at the debrief. And it seems to me this myopia really has begun to change.

We are more open to observing behavior and rediscovering its psychological roots. We are more open to working with messy, large-scale data sets – often passively collected. We are more open to the idea that results are the beginning of the story, not the end of one. We are more open to making, not just telling. We are more open to the real world, both of our participants' and our clients'.

The future will still have plenty of challenges. But we're in a good place to meet them. Research now is more psychologically attuned, more technologically capable, more creative and simply more fun than at any time since I joined the industry. And that's a reason to be cheerful.

Tom Ewing is content director at BrainJuicer Labs, London. He can be reached at tom.ewing@brainjuicer.com.

Names of Note

■ *Sony Pictures Entertainment* has named **John Restall** executive vice president of domestic marketing research, responsible for all domestic theatrical market research efforts for the studio's marketing department.

■ **David Kaminow** has been named president of marketing by *Annapurna Pictures*, a Los Angeles production company. He will be responsible for all global marketing and publicity for Annapurna Pictures and its projects.

■ Tokyo researcher *Macromill* has appointed **Kuniko Ogawa** as chief technology officer and **Teruaki Kido** as chief financial officer.

■ Watertown, Mass., research firm *Communispace* has appointed **Jonathan Stinnett** as vice president and managing director of its New York City office.

■ **David Weldon**, managing director, brand, reputation citizenship and marketing for *Barclays Bank*, London, was named president of the *World Federation of Advertisers*, Brussels.

■ **Kat Hounsell** has been promoted to sales and marketing director at *eDigitalResearch*, Southampton, U.K., while **Graham Larkin** has moved to the business development team to lead special projects.

■ *The Financial Times*, London, has hired **Renée Kaplan** for the newly created role of head of audience engagement. Other new hires included **Bede McCarthy** as director of product, **Mark Alderson** as head of operations for the newsroom and **Kevin Wilson** as visual news editor.

quirks.com/articles/2015/20150611.aspx

■ **Joseph Rabin**, founder and president of *Rabin Research Company*, Chicago, has retired. He has served as national president and Chicago chapter president of the American Marketing Association as well as director of the Market Research Institute. He will be succeeded by **Michelle Elster** and **Nina Mueller** will move into the executive vice president position.


Elster

■ *The Reputation Institute*, New York, has appointed **Scott Upham** as vice president of U.S. measurement consulting, while **Stephen Hahn-Griffiths** joins as vice president of U.S. strategy consulting. Upham, founder and CEO and president at *Valient Market Research*, Rochester, N.Y., will continue his role there.

■ **Kevin Ford** has joined New York research firm *ORC International* as head of markets and products research in Europe. His responsibilities will include consolidating and expanding ORC's markets and products offering.

■ In San Francisco, marketing firm *Kvantum* has hired **Bill Gedwill** as vice president of business development. Gedwill will be based in Chicago and will oversee Kvantum's expansion efforts into the Midwest region as well as building relationships with clients in consumer packaged goods, retail, food and beverage industries.

■ **Kevin C. Fox** has joined *Viega LLC*, a Wichita, Kan., building materials firm, as the director of marketing.

■ *Directions Research*, Cincinnati, has promoted **Erin Dougherty** to senior account executive and **Michael Hunter** to senior project manager. New hires include **Maritza Espinal** as senior research analyst, **Rick Haneberg** as production services assistant and **Austin Hatch** as onsite project manager for its Minneapolis office.


Dougherty


Hunter


Espinal


Haneberg


Hatch

■ **Fredda Hurwitz** has been promoted to global chief strategy officer at the *Havas Sports and Entertainment* (Havas SE), marketing firm, London, while **Thiago Bersou** joined as global creative planning director.

■ *Finn Partners*, a communications and public relations firm headquartered in New York, has hired **Chris Lawrence** as director of research. He will be located in the firm's Washington, D.C., office.

■ St. Petersburg, Fla., digital media firm *Catalina* has promoted **Dak Liyanearachchi** to chief data officer.

■ In New York, researcher firm *TNS* has promoted **Andy Turton** to head of automotive for the Americas. He was previously global development director for TNS Automotive.

■ **Richard Hirata** has joined State College, Pa., research firm *VideoMining Corp*. as senior vice president of analytics product management.

■ *Kinesis Survey Technologies*, a survey software specialist in Austin, Texas, has hired **Reaghan Roche** as marketing manager.

■ **Victoria Wood** has joined *Vision One Research*, London, as director, leading its qualitative, advertising and retail services.

■ Digital agency network *Wunderman, New York*, has hired **Yannis Kotziagkiaouridis** as global chief analytics officer. He will be based in Dallas. Separately, **Gary Laben** been named global chief data officer. He will continue in his role as CEO of KBM Group, the data, insights and marketing technology arm of Wunderman.

■ *ICapital Network*, a New York financial services firm, has hired **Hannah Shaw Grove** as senior vice president and chief marketing officer.

■ London research company *Crowd DNA* has promoted **Sarah Brierley** to business and strategy director and **Aurelie Jamard** to associate director of innovation. Also, **Laura Warby** has joined the company as a senior consultant and **Milly Derbyshire** as a consultant.

■ **Timothy Keiningham**, global chief strategy officer and executive vice president at *Ipsos Loyalty*, received the *Journal of Service Management*'s 2014 Robert Johnston Outstanding Paper of the Year award for his paper titled "A longitudinal examination of customer commitment and loyalty."

■ **Jane Bloomfield** has joined the London office of *Millward Brown* as brand development director with responsibilities for strengthening client relationships and expanding the firm's services.


Wood

■ *Vision One Research*, London, has hired **Victoria Wood** as director of the qualitative insight team. She will head the qualitative, advertising and retail services, along with developing Vision One's AdProbe advertising research platform.

■ *RS Consulting*, London, has made several promotions, with **Lorena Arrospide**, **Rhiannon Jones** and **Danielle Rodgerson** moving from senior research consultant to research manager. Also, **Chloe Gooders** and **Claire Chiu** were named research consultants, **Arun Shrestha** senior research consultant and **Emanuela Lombardi** research operations coordinator.

■ Media agency *MEC South Africa*, Johannesburg, has appointed **Alan Morrissey** as head of analytics and insights.

■ **Marc Goulet** has been promoted to vice president, client development, at *Russell Research*, East Rutherford, N.J.


Retzer

■ Milwaukee researcher *Market Probe* has hired **Joseph Retzer** as chief research officer and **Andrea Corrado** as vice president.


Corrado

■ *Havas Media Group* has appointed **Damien Marchi** as its global head of content. He will be based in the firm's Paris headquarters.

■ Paris researcher *Toluna* has appointed **Ludovic Milet** as managing director, APAC. He will be based in Hong Kong.

■ *NatCen*, Britain's social research institute, has named **Phil Doggett** as interim chief operating officer.

■ **Carol Fitzgerald**, CEO and founder of *BuzzBack Market Research*, New York, was named one of Enterprising Women's 2015 Enterprising Women of The Year. A total of 95 women received the honor, which recognizes women who have fast-growth businesses, are community leaders and mentor other women and girls involved in entrepreneurship.

■ **Andy Ellis** will become president of New Orleans sample specialist *Fulcrum*, replacing **Michael McCrary**. McCrary will move over to the role of chief revenue officer of the Federated Sample business unit. The two companies had formed one company but split last summer into the two lines.

■ In Warren, N.J., research firm *Lightspeed GMI* has hired **Emma Beech** as vice president, operations EMEA, to lead the operations teams in Europe. She will be based in the London office.

■ **Andrew Appel**, president and CEO of *Information Resources Inc.*, Chicago, has been named to the board of directors of the Advertising Research Foundation, New York, for a three-year term.

■ **Amy Populorum** has joined Arlington, Texas, researcher *Decision Analyst Inc.* as senior vice president of client services.

■ **Claire Grimmond** has joined media research company *Digital-i*, Taunton, U.K., as managing director.

■ **Danielle Levitas** has joined San Francisco software firm *App Annie* as senior vice president of research and analysis to head its new internal research team.

■ *Kadence India* has hired **Deepak Singh** as managing partner.

■ *The Target Research Group*, Nanuet, N.Y., has hired **Christopher Marino** as account group manager at its headquarters and **Leo Jon Jurado** as survey programmer in Ft. Lauderdale, Fla.

■ **Claire Milner** has joined family research specialist *iGen Insight*, London, as a research manager.

■ Little Rock, Ark., information company *Acxiom* has appointed **Rick Erwin** as president and general manager of its Audience Solutions division, which includes company's data and decision sciences resources.

■ Redwood City, Calif., software firm *Attensity* has hired **Cary Fulbright** as chief strategy officer and promoted **James Purchase** to vice president of business development and **Nick Arnett** to director of product management.

■ **Kurt DelBene** is returning to *Microsoft* as executive vice president of corporate strategy and planning. He had left the firm in 2013 to work as a senior advisor to the U.S. the Secretary of Health and Human Services.

■ **Elke Neuteboom** has been appointed by *Beehive Research*, London, as research director, responsible for managing mixed methodology programs for clients.

■ **Izzy Nurdin** has joined London research firm *Dub* as client services director.

■ Iselin, N.J., research company *Schlesinger Associates* has promoted **Terri-Lyn Hawley** to vice president operations and has expanded the role of **Stephenie Gordon**, vice president of qualitative solutions, to include management of the firm's 14 focus group facilities across the U.S.

■ **Remy Denton** has joined *CMI*, an Atlanta research firm, as research manager.

■ *Krux*, a San Francisco data management software firm, has appointed **Baochi Nguyen** as vice president of marketing.

■ *Garden-Fresh Foods*, Milwaukee, has hired **Jim Gawronski** as director of sales and marketing and **Mike Walz** as chief operating officer, along with promoting **Robert Clark** to director of research and development. **Tom Hughes**, who co-founded Garden-Fresh along with **Vicki Hughes**, will remain as president.

■ San Francisco software firm *Mindjet* has appointed **Amy Millard** as its new chief marketing officer.

■ **Carla Bourque** has joined Los Angeles researcher *Instantly* as general manager for its Automated Sample division.

■ **John Nardone** has joined London technology company *Flashtalking* as CEO.

■ *Smarty Pants*, a Johnson City, Tenn., research firm, has added **Charles DeGregorio** to its team as qualitative research guru.

■ **Renee Loman** has joined *EurekaFacts*, a Rockville, Md., research firm, as focus group coordinator, responsible for promoting the company's facilities, services and products.

■ *Webtrends*, a Portland, Ore., digital analytics specialist, has promoted **Xavier Le Hericy** to the newly created role of chief security officer and vice president of security and privacy.

■ Sparks, Md., food production company *McCormick & Company* has appointed **Nneka Rimmer** to the role of senior vice president of corporate strategy and development.

■ New York marketing firm *Interbrand* named **Victoria Leavitt** CEO of consumer and retail brand experience in North America. She will oversee the Cincinnati and Dayton, Ohio, offices for consumer branding and retail.

■ Irvine, Calif., marketing firm *Strottman International* has appointed **Amy Henry** as senior vice president of strategic insights.

■ **Barron T. Evans** has joined *Targetbase*, a Dallas communications company, as vice president of strategy.

■ Hartford, Conn., insurance company *The Hartford* has named **Kathy Bromage** as chief marketing and communications officer, effective June 1.

■ Port Washington, N.Y., research firm *Paradigm Sample* has added **Rick Wilson** as vice president of online and mobile solutions.

■ **Wayne Lashua** has joined Cincinnati researcher *Burke, Inc.* as vice president, senior account executive in client services.

CALENDAR OF EVENTS

••• can't-miss activities

The Pharma CI Asia Conference and Exhibition will be held on June 9-10 at the Westin Tokyo Hotel in Tokyo. Visit http://www.pharmaciconference.com/.

The 14th Annual Text Analytics Summit East conference will be held on June 15-16 at the New York Hotel, New York. Visit http://textanalyticsnews.com/west/.

OMICS International will hold the International Conference and Expo on Smart Materials and Structures, themed "Exploring the Fusion of Intelligence with Materials," on June 15-17 in Las Vegas. Visit http://omicsonline.org/.

The European Pharmaceutical Market Research Association will hold its annual conference on June 23-26 in Amsterdam. Visit http://www.ephmra.org.

Woldwide Business Research will hold its Future Stores 2015 conference, themed "Merging the Digital and Physical Retail Environment," on June 23-25 in Seattle. Visit www.future-stores.com.

IIR will hold its international Shopper Insights in Action event, themed "The Future of Shopping: Resetting expectations and synergizing ecosystems," on July 14-16 at the Navy Pier in Chicago. Visit http://www.iirusa.com/insightsintl/home.xml.

Unicom will hold a conference, themed "Behavioral Models and Sentiment Analysis Applied to Finance," on July 15-16 at the Millennium Hotel London Mayfair. Visit http://conferences.unicom.co.uk/sentiment-analysis/.

Alta Plana will hold an event, themed "Sentiment Analysis Symposium," on July 15-16 at the New York Academy of Sciences in New York. Visit http://www.sentimentsymposium.com/.

The Management Roundtable will present a conference, themed "Summer Camp 2015: Positive Digital Strategy," on August 5-7 in Colorado Springs, Colo. Visit http://thecollaboratives.com/.

Worldwide Business Research will hold its flagship conference, "eTail East," on August 10-13 at the Sheraton Boston Hotel in Boston. Visit www.etaileast.com.

The AMA will hold its summer marketing educator's conference on August 14-16 in Chicago. Visit www.ama.org.

Adaptive Path will hold its flagship event, UX Week, on August 25-28 at the Hyatt Regency San Francisco in San Francisco. Visit http://www.adaptivepath.com/events-training/.

The 2015 Pharma CI USA Conference and Exhibition will be held on September 10-11 at the Hilton Parsippany Hotel in **Parsippany, N.J.** Visit http://pharmaciconference.com/.

The Merlien Institute will hold a conference, themed "Market Research in the Mobile World Europe," on September 15-17 in London. Visit http://www.mrmw.net/europe.

The Strategy Institute will hold its Digital Customer Experience Strategies Summit on September 23-24 in Chicago. Visit http://www.digitalcustomerexp.com/.

The AMA will hold its annual marketing research conference on September 27-29 in Austin, Texas. Visit www.ama.org.

ESOMAR will hold its annual congress on September 27-30 in Dublin. Visit www.esomar.org.

PMRG will hold its ninth annual meeting of the PMRG Institute on October 4-6 at the Marriott Philadelphia Downtown. Visit http://www.pmrg.org/EventsWebinars/tabid/58/Default.aspx.

QRCA will hold its annual conference on October 7-9 at the Hilton Bonnet Creek in Orlando, Fla. Visit www.qrca.org.

Richmond Events will host a conference, themed "The Market Insight Forum," on October 8 at the Harvard Club in New York. Visit http://www.us.marketinsightforum.com/.

Worldwide Business Research will hold a conference, themed "Luxury Interactive," on October 13-15 at the Time and Life Building in New York. Visit www.luxuryint.com.

The Neuromarketing Science and Business Administration (NMSBA) will hold a conference, titled "Neuromarketing in Retail," on October 15-16 in Amsterdam. Visit http://www.neuromarketingretail.com/.

CASRO will hold its annual conference on October 21-23 in Miami. Visit http://www.casro.org/?page=40AC.

The Merlien Institute will host a conference, themed "Qualitative 360 Asia Pacific," on October 21-22 in Kuala Lumpur. Visit http://qual360.com/asia-pacific.

The Life Insurance and Market Research Association will hold its annual conference on October 25-27 at the Sheraton Boston Hotel in Boston. Visit www.limra.com.

Research and Results will hold its annual conference on October 28-29 at the MOC Convention Center in Munich, Germany. Visit http://www.research-results.com/trade-show/exhibitor-information.

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.

Research Industry News

News notes

■ Canada-based research firm **itracks** announced that a license has been negotiated between itracks and **20/20 Research**, Nashville, Tenn., for itracks' U.S. Patent No. 6,256,663, an invention entitled System and Method For Conducting Focus Groups Using Remotely Located Participants Over A Computer Network. The patent was issued on July 3, 2001 and subsequently assigned to itracks. The terms of the license agreement are confidential.

■ In April, the European Union filed formal antitrust charges against **Google**, charging that it skewed its Internet search results to favor its own comparison-shopping service in breach of EU antitrust rules. The competition commissioner, Margrethe Vestager, is also investigating Google's Android mobile operating system. Google currently accounts for 90 percent of all Internet searches in Europe. A memo to Google employees said that Google had a "very strong case" against the charges, one defense being that Google offers a quicker and more direct service to consumers. Previously, the EU had filed antitrust charges against Microsoft in 1993 which resulted in Microsoft paying more than $2 billion in fines in 2009.

quirks.com/articles/2015/20150612.aspx

■ **The National Readership Survey** (NRS), London, which provided Web site and print readership figures for all major U.K. newspapers and magazines, has been replaced by **PAMCO** (the Publishers Audience Measurement Company). PAMCO will incorporate data from new devices and platforms. Simon Redican, NRS CEO, has been named PAMCO's CEO-designate.

■ Several child and consumer protection groups, including the **American Academy of Child and Adolescent Psychiatry**, the **Center for Digital Democracy**, and the **Consumers Union**, have requested that the U.S. Federal Trade Commission investigate Google's **YouTubeKids app**. YouTubeKids provides programming from *National Geographic Kids*, *Thomas & Friends* and *Reading Rainbow*. The child advocacy groups argue that the videos intermix videos with commercial content in ways that would not be allowed on broadcast or cable television.

■ A class-action lawsuit has been brought against **Facebook** in Cook County Court, Ill., asking for a court injunction that would require Facebook to comply with the Illinois Biometric Information Privacy Act of 2008. The plaintiffs argue that Facebook is in violation of the Act as it currently collects users' facial data with its automatic photo tagging feature which scans all pictures uploaded by users. The information is then compiled in a database of consumer biometric data to allow tagging of photos. Lead plaintiff Carlo Licata says he was never asked for permission before his facial data was collected and stored or given an opportunity to opt out. The Illinois law states that companies must obtain written permission from people before collecting biometric data and notify people when they gather such data. Facebook was forced to close down the facial recognition feature in Europe due to privacy concerns.

■ Following the March death of veteran researcher William "Jay" Wilson, the **W. Jay Wilson Memorial Scholarship Fund** has been established at Colby-Sawyer College. Donations can be made c/o Beth Cahill, Colby-Sawyer College, 541 Main Street, New London, N.H. 03257.

■ **IBM** plans to invest $3 billion over the next four years to establish an Internet of Things (IoT) division, designed to help clients integrate data from IoT and other sources. The company estimates that 90 percent of data generated from smartphones, tablets, connected vehicles and appliances is never used. Bob Picciano, senior vice president of IBM Analytics, commented, "IBM will enable clients and industry partners to apply IoT data to build solutions based on an open platform. This is a major focus of investment for IBM because it's a rich and broad-based opportunity where innovation matters."

■ **The Media Rating Council** (MRC), New York, has found that New York researcher Rentrak's national and local TV ratings products are as yet "not sufficiently compliant with its standards," following more than a year of auditing. However, the MRC pointed out that it is not unusual for "a complex rating service" to not pass the initial audit" and stressed that work with Rentrak is ongoing. A Rentrak spokesman said that after a remediation period, the firm will begin the next audit before the end of the year.

■ New York researcher **Nielsen** will begin offering data on viewing by Netflix and Amazon Prime subscribers starting in the middle of the year. The technology utilizes listening capabilities in its set-top boxes. It will not work for original Netflix programs such as *House of Cards*.

Acquisitions/transactions

■ **Dentsu Aegis Network**, a London marketing and advertising company, has acquired **Forbes Consulting Group**, a Lexington, Mass., research firm. Forbes will become part of Copernicus, the marketing strategy consultancy, with Forbes founder David Forbes serving as chief innovation officer of Copernicus.

■ Direct marketing firm **Harte Hanks** has sold its **Aberdeen Group** and **Harte Hanks Market Intelligence** to subsidiaries of the private equity firm **Halyard Capital**. Aberdeen Group is a technology researcher that provides reports based on primary research and benchmarking data; Harte Hanks provides technology industry data for marketing and sales. The two businesses will be known as The Aberdeen Group. Terms were not disclosed.

■ **WPP** has acquired **Medialets**, a New York technology company that helps marketers manage and measure the ROI of mobile ad campaigns. It will continue to operate as a separate company.

■ Chicago research firm **Information Resources Inc.** has acquired **Datasea**, a China-based analytic services and market research firm specializing in the retail and CPG industries.

■ New York social technology specialist **Sprinklr** has acquired **Get Satisfaction**, a San Francisco-based online community platform. Sprinklr says that the acquisition adds to its social media tools for customer relationship, campaign and audience management.

■ Englewood, Colo., information services firm **IHS** has acquired **RootMetrics**, a Bellevue, Wash., mobile network specialist. Terms were not disclosed.

■ **Merkle**, a Columbia, Md., marketing agency, has acquired **Pointmarc**, an analytics consultancy in Bellevue, Wash. The Pointmarc employees will join Merkle's quantitative marketing group.

■ Stockholm public relations software specialist **Cision** has acquired **Viralheat**, a San Mateo, Calif., social media analytics software firm.

■ In Shelton, Conn., **SSI** has completed the acquisition of the majority of assets of Philadelphia research firm **MRops**.

■ **Dentsu Aegis Network** has acquired **abaGada Internet Ltd.**, a Tel Aviv, Israel-based digital performance marketing agency. AbaGada will become part of Dentsu Aegis Network and transition towards operating as iProspect – Dentsu Aegis Network's global digital performance agency.

■ Public relations firm **Edelman** will acquire **DABO & CO**, an independent communications agency in the UAE. The agency will offer creative, research, planning and event management across the Middle East.

■ New York marketing and advertising company **Xaxis** has acquired **Action Exchange**, a New York ad technology firm.

■ Los Angeles technology firm **MarketShare** has acquired **DataSong**, a San Francisco retail analytics specialist. DataSong CEO John Wallace will become chief growth officer at MarketShare and Mike DeVries, DataSong president, will become head of business management.

■ **Microsoft** has closed its acquisition of **Revolution Analytics**, Mountain View, Calif., which provides tools for the open source R programming language. Dave Rich, CEO at Revolution, will become the general manager of advanced analytics at Microsoft.

■ **Vox Media**, a marketing and advertising firm, has acquired fellow Washington, D.C., firm **OpBandit**, a software specialist, in a move designed to help online publishers and marketers track how the online behavior of their readers. Vox Media will integrate the OpBandit technology into its Chorus platform. OpBandit founders Brian Muller and Blaine Sheldon will join the Vox Product team.

■ **Kairos**, a Miami technology company, has acquired **IMRSV**, a New York software firm specializing in emotion analysis by gathering audience data such as gender, age and attention time using a Webcam and its Cara platform.

Alliances/strategic partnerships

■ **Kantar** is partnering with Reston, Va., research company **comScore** to provide Internet audience measurement services in non-U.S. markets. ComScore will issue 4.45 percent in shares for the benefits of the strategic alliance and WPP will purchase up to 15 percent of comScore's shares, giving WPP a total ownership stake of 15 to 20 percent.

■ Irvine, Calif., real estate company **RealtyTrac** has joined with **Acxiom**, a Little Rock, Ark., analytics and software company, in a multiyear agreement to include RealtyTrac's national tax assessor and recorder files and pre-foreclosure information in Acxiom's databases, including InfoBase and AbiliTec.

■ New York online technology firm **AOL** has expanded its partnership with **FourthWall Media**, a Dulles, Va., researcher, to provide viewer information from approximately 2 million U.S. households for targeted television advertising.

■ New York researcher **Nielsen** is partnering with **RetailNext**, a San Jose, Calif., provider of retail analytics of in-store data for brick-and-mortar stores. The RetailNext programs will be combined with Nielsen's sales performance, promotion, pricing and merchandising information to better analyze shopper behavior.

■ **ThinkNow Research**, Burbank, Calif., and Vancouver software firm **Vision Critical** are partnering to utilize the Vision Critical customer intelligence platform with ThinkNow research projects.

■ **The Data Alliance** marketing company of WPP, New York, and **Facebook** have agreed to a multi-year partnership to provide WPP clients with access to new personalization options on Facebook. WPP companies will also be working with Facebook to pilot new data-driven measuring tools and conduct research on services and metrics that will help brands better utilize their Facebook campaigns.

Association/organization news

■ At their respective board meetings held in Las Vegas earlier this year, the boards of directors of **POPAI** (Point of Purchase Advertising International) and **A.R.E.** (the Association for Retail Environments) voted to consider a merger. Both non-profit associations will now enter a due diligence phase and hold a vote of all active members.

■ **The Marketing Research Association** (MRA) has lined up multiple business organizations, including the U.S. Chamber of Commerce, the Internet Association and the National Restaurant Association, to oppose making responses to the **American Community Survey** (ACS) voluntary, rather than mandatory, as it currently stands. The ACS is a Census Bureau survey which provides statistically representative samples for most of the surveys, opinion and market research studies in the U.S. The organizations sent letters to the U.S. House of Representatives and the Senate urging that the ACS continue as a mandatory survey.

Awards/rankings

■ Omaha, Neb., research firm the **MSR Group** awarded **Investors Bank** its APECS Customer Advocacy Award, Northeast Region, for the second consecutive year. The award is given to the retail bank receiving the highest net advocacy rating among its regional customers.

New accounts/projects

■ **Mitsubishi Motors North America, Inc.** has contracted with **Vital Insights**, a Mississauga, Ontario, research company, for use of its survey and analytics tools.

■ Stockholm software firm **Cint** has secured a multi-year agreement with Nuremberg, Germany, research company the **GfK Group** for access to Cint's OpinionHUB marketplace and support on API integrations and supply chain management.

■ Portland, Ore., researcher **Rentrak** contracted with **Carnival Cinemas**, India, to provide its box office reporting system in its theaters. Separately, Rentrak announced it will provide TV ratings and IHS Polk Automotive data to **Discovery Communications**. This will provide more comprehensive measurement of advertising campaigns on Discovery's collection of networks. Rentrak has also signed a multi-year contract with **WUSA9**, the Gannett-owned CBS affiliate in Washington, D.C., to provide TV measurement services. Also Rentrak has signed a TV measurement agreement with **KDOC-TV(IND)** in Los Angeles.

■ **Market Publishers**, London, has reached an agreement with **QYResearch** to add its studies to the Market Publishers catalogue.

New companies/new divisions/relocations/expansions

■ In New York, analytics specialist **Madison Logic Data** has been renamed **Bombora**.

■ Fayetteville, Ark., mobile survey firm **Field Agent** is expanding into Romania, adding to its operations in the U.S., Canada, the U.K., Australia, Norway, Sweden and Denmark.

■ WPP data company the **Data Alliance**, New York, has opened a new office in Cape Town, South Africa, to be led by managing director Devon Tighe.

■ **The National Retail Federation** (NRF), Washington, D.C., plans to create a new department, the Retail Research and Analysis Center, which will focus on industry research and bring together all existing research within NRF. The Center will examine the economy, legislative and regulatory policy, the retail industry and consumers.

■ **WPP** has established a marketing insight consultancy, **Gain Theory**, within its GroupM division but separate from its media-buying. Its team of marketing effectiveness consultants and analysts will be led by worldwide CEO Jason Harrison. Gain Theory will have hubs in New York, London and Bangalore.

■ **SPA Future Thinking** has re-branded as **Future Thinking** with a redesigned Web site at futurethinking.com. Jon Priest, group CEO, and Richard Barton, group managing director, and the present senior management team will continue in their current roles.

■ In Haryana, India, a new company, **SampTech Consulting Services**, has been launched by Sandeep Chibber and Ashish Mathur. The firm will offer a range of services to help retailers and corporate clients understand consumer choices and motivations.

■ Provo, Utah-based software firm **Qualtrics** has opened an engineering office in Seattle, to be headed by John Thimsen.

■ Japanese research firm **Macromill** has opened an office in Singapore and hired Rob Valsler as its managing director.

■ Stockholm software company **Dapresy** has opened an office in Toronto. It will be headed by Jonathon Ware, vice president, business development, Canada.

■ Dan Soulas has launched his own research firm, **Market Intel Group**, near Philadelphia. Dan was previously U.S. managing director at Ebiqity.

■ West Sussex research firm **product perceptions** has re-branded to **PPL Insights** to reflect the wider scope of services being offered. Its Web site has also been redesigned.

■ Richard Matthews and his wife Catherine have launched a public relations and communications firm, **Spotty Dog Strategy**, in Birmingham, U.K. Matthews was previously the GfK head of innovation.

Research company earnings/ financial news

■ London health and consumer marketing group **Cello** reported an increase of 6.4 percent in 2014 revenues, resulting in £169.9 million in revenue. This is a 9.9 percent increase in headline operating profit before tax to £81.0 million. The company also appointed Stephen Highley as chief operating officer. He has served as Cello Health chairman since 2011.

■ **Study Hall Research**, Tampa, Fla., reported Q1 2015 results with revenues for the quarter up 59 percent from the same period a year ago. Contracted work increased by 25 percent from Q1 2014.

■ **BrainJuicer**, London, reported revenue growth of 1 percent to £24.65 million for the 2014 financial year. Pre-tax profits rose 21 percent to £4.29 million. Gross profit was flat in the U.K., its largest market, but grew 11 percent in the U.S., its second largest market. Profit in continental Europe fell 14 percent and the firm has decided to close its office in Italy which had a "significant" loss.

■ London researcher **YouGov** reported an 11 percent increase in revenue for the first half of its fiscal year, ending on January 31, 2015, with revenue totaling £36.2 million. Profit before tax was £16,000, compared to losses of £400,000 in the prior year.

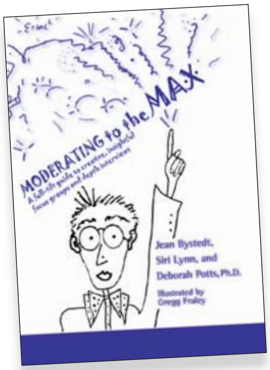
■ London research firm **Trinity McQueen** increased its sales by 17 percent, reaching £3.98 million, in the financial year ending September 30, 2014. This follows an increase of 39 percent in 2012-13.

■ **Join the Dots**, a Manchester, U.K., researcher, reported a growth in annual revenue of 25 percent to £6.1 million in 2014, which surpassed its 23 percent growth in 2013.

■ San Francisco software firm **GlimpzIt** has completed a $1.1 million seed funding round. The company's platform provides customers with pictures and video responses from mobile consumers using smartphones. The platform is currently in a closed beta with more than 20 brands.

■ **Nielsen N.V.** announced first-quarter 2015 results and that its board of directors approved an increase in the company's quarterly cash dividend of 12 percent to $0.28 per common share. Revenues were $1,458 million, down 2.1 percent due to the impact of foreign exchange but up 4.4 percent on a constant currency basis, compared to the first quarter of 2014. Adjusted EBITDA for the first quarter increased 1.1 percent to $380 million, or 7.3 percent on a constant currency basis compared to the first quarter of 2014. As a percentage of revenues, adjusted EBITDA grew 81 basis points, or 70 basis points on a constant currency basis, due to the accretive impact of investments in coverage and analytics capabilities and the benefit of ongoing productivity initiatives. Income from continuing operations for the first quarter increased by 14.5 percent to $63 million, an increase of 53.7 percent on a constant currency basis, compared to the first quarter of 2014. The increase is driven by lower restructuring charges and the benefit of ongoing productivity initiatives. Income from continuing operations per share on a diluted basis was $0.17 compared to $0.15 in the first quarter of 2014. Adjusted net income for the first quarter increased 4.8 percent to $173 million, or 14.6 percent on a constant currency basis, compared to the first quarter of 2014. Adjusted net income per share on a diluted basis was $0.46 compared to $0.43 in the first quarter of 2014.

MARKETING RESEARCH



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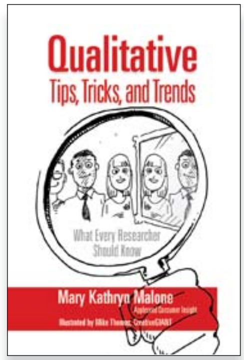

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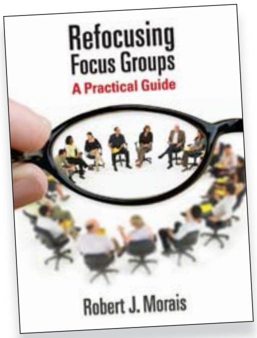

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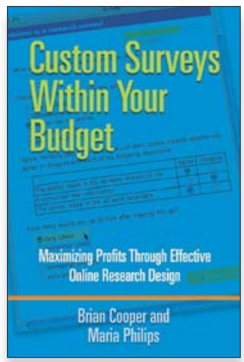

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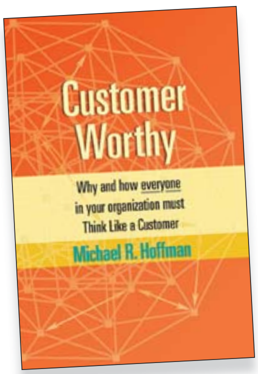

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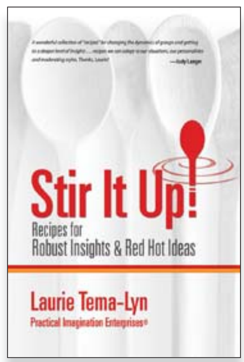

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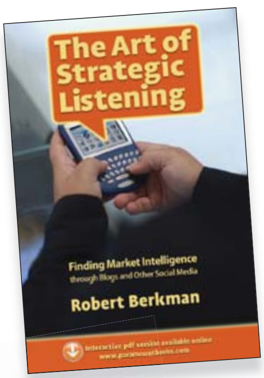

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BEFORE YOU GO ••• issue highlights and parting words

••• cover-to-cover

Facts, figures and insights from this month's issue

page 8

"People really do tweet about everything and conversations about vaccines are no exception."

page 16

When it comes to using financial instruments, Hispanics' monetary habits differ from those of the total U.S. population.

page 19

Owing to the boom in online commerce, luggage sales through the Internet have been growing at a significant pace.

page 41

One of my biggest pet peeves is that so many marketers focus too much on subtle differences between subgroups and lose sight of the overall.

page 54

For research companies, the pressure to use technology not chosen centrally by the company is even greater.

page 62

The more we understand about how the mind works, the more the aim of research shifts.

Missed the shows? Win the swag!

The Quirk's staff goes to numerous marketing research and insights conferences throughout the year and we've collected more swag (i.e. stuff the exhibitors give out to attendees) than we know what to do with!

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Coming in the July Quirk's

••• shopper insights

How environmental groups in the Puget Sound area used research with hardware store shoppers to test the value of instructing them about low-impact herbicides.

••• shopper insights

Monrovia conducted in-depth research with its plant-buying customers to understand what motivates gardeners at all interest levels.

••• the business of research

Doug Berdie offers three tips to increase the internal credibility of survey-generated data.

Thank You

to the market research community

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