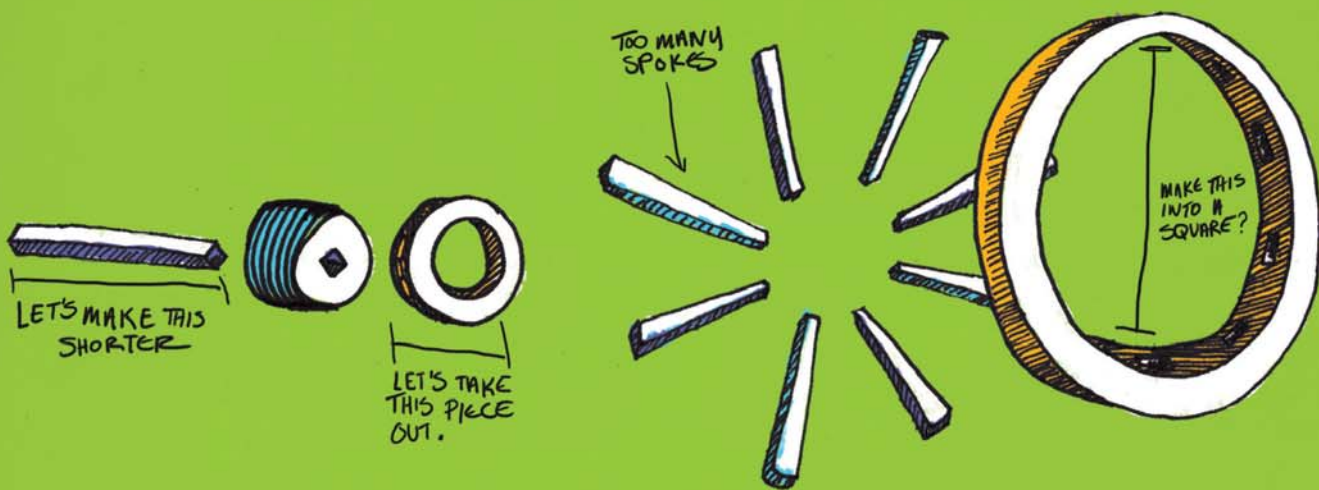# QUIRK'S

## Marketing Research

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Adapting panels and communities for a mobile environment

2015 Research Panels Directory

November 2015
www.quirks.com

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## Salary survey crosstabs available for 2015

Each year for the past seven years, Quirk's has conducted a salary survey of client-side researchers (and suppliers) so that our readers can get a snapshot of how the compensation landscape is today and how it's changing. This year the data was published in the Corporate Research Report, an independent study written for and developed with the help of client-side marketing research and insights professionals. The report covered two main areas: work life and compensation.
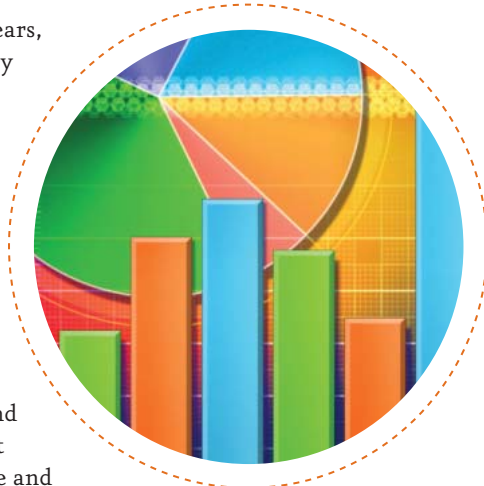
While you may have already read the Corporate Research Report in print or online, did you know that the salary survey data is available online, searchable by client-or provider-side job title? Once you click on the job title you would like more information about, you're taken to a breakdown of salaries by age, gender, industry, region, annual revenue/sales of organization, the number of full-time MR staffers and more!

Check out the salary survey crosstabs at www.quirks.com/salary.

Still haven't read the Corporate Research Report? You can download a free copy by visiting quirks.com/PDF/CorporateResearchReport.pdf.

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## ••• automotive research
# Car-owners generally open to sharing data with automakers

More than half of the people surveyed by McKinsey & Co. said they had no problem allowing their car to collect information and send it anonymously to the automaker to help improve the next generation of the vehicle, as reported by the *Wall Street Journal*'s Jeff Bennett.

The number jumped to 76 percent if car companies guaranteed the data would be used only to improve vehicles and not be shared with anyone else. Seventy percent said they are already "consciously" sharing their data with smartphone applications, such as mapping directions.



Thirty-seven percent of those surveyed said they would be willing to switch to another manufacturer if it was the only one offering a vehicle with full access to apps and data. Last year the number was 20 percent.

Meanwhile, 61 percent of those surveyed said cars with autonomous functions should be legal. Another 27 percent would agree but only after seeing successful pilot projects.

Along with the consumer survey, 91 executives in automotive and related industries were also questioned. A total of 75 percent of those executives said they had no countermeasure strategy in place in case their vehicles were hacked. A total of 3,184 people from the U.S., Germany and China were interviewed for the McKinsey Connectivity and Autonomous Driving Consumer Survey.



quirks.com/articles/2015/20151101.aspx

## ••• consumer psychology
# We're up in the air about Airbnb

Consumers are divided in their opinions of companies that make up the sharing economy in the U.S., according to a recent nationwide survey of U.S. consumers by Radius Global Market Research, New York.

Consumer opinion is evenly split on whether companies in the sharing economy compete fairly with more traditional businesses, such as taxicabs or hotels, as roughly equal numbers of consumers either agree (47 percent) or disagree (53 percent) with that statement.

But consumers also have positive opinions of the current and future roles of these companies in the U.S. economy. Consumers more often agree that these companies provide income sources that are not otherwise available (88 percent), that they make it easier for consumers to get the products and services they want (91 percent) and that they are important to the future success of the economy (78 percent).

Radius GMR's study shows that participation in the sharing economy is relatively minimal. Fewer than one-in-five consumers have used Uber in the past year. And even fewer consumers reported using services provided by Airbnb (7 percent), TaskRabbit (4 percent), HomeAway (6 percent) or GetAround (3 percent) in that time period.

# Effective problem resolution can be a win-win for B2B firms



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Joe Rydholm can be reached at joe@quirks.com

One of the panels we have scheduled for the 2016 Quirk's Event in Brooklyn in February will focus on business-to-business research. We're still working to narrow down the specifics, so if you have ideas for topics you'd like to have us address, please send me a note. (And if you are a client-side B2B researcher who'd like to be considered as a panelist, contact me for that as well!)

We felt like B2B research was a worthwhile subject to explore because that part of the MR industry tends to take a back seat to the B2C part, at least in terms of airtime at conferences and gatherings. And further, while researchers in both camps use many of the same techniques and are seeking answers to the same kinds of marketing questions, there are crucial differences between B2B and B2C research that sometimes get glossed over.

Some of them were addressed in a recent article, "Service failures have harsh consequences for B2B companies," by Gallup researchers Daniela Yu and Julie Lamski. (You can find the full article online at http://bit.ly/1jcRcEy.) While both B2B and B2C researchers focus heavily on customer-related research, a B2B customer is typically a different animal than a B2C customer and the stakes for B2B firms can be exponentially higher when problems occur, the authors note:

[W]hen a customer encounters a problem in the B2C world, he may become disengaged and stop buying from that company. If that happens, the company will lose just one of its thousands or millions of customers; for a retail bank, it might be a savings account worth $5,000. But for a B2B supplier, losing one customer can result in a significant loss of income. In the case of a professional services company, a frustrated customer could take away a contract worth millions of dollars.

Gallup urges companies to see problems as opportunities to deepen customer engagement, with the thought that effective and creative handling and resolution of problems can strengthen the bond between company and customer. The company can show the customer it cares about the relationship and also learn more about the customer's needs, problems and issues.

Further, the B2B buying process is almost always complex. While there may be a single point of contact within the customer's firm who makes a purchase, that person may have gatekeeper after gatekeeper to obtain final approval from and/or manage the needs and expectations of and any breakdown in this chain of influence can sabotage the sales process.

[P]roblems may stem from a lack of communication, misunderstandings or conflicting messages between the supplier and the members of the company's buying center, or among buying center members themselves. Because of this, suppliers should build strong relationships to facilitate timely and accurate communication. When product, service or communication failures occur, suppliers can draw on these partnerships when discussing and negotiating how to solve these problems.

Problem resolution is a team effort and the authors extol the value of rewarding and empowering employees for identifying and helping solve customer problems but Gallup also urges senior leaders to step to the fore when the time is right.

Never underestimate the positive influence a senior leader's proactive and sincere apology can have. Senior leaders also need to "walk the walk" if they want to inspire all employees to maintain a focus on customers and go above and beyond to solve problems. Finally, senior leaders' sponsorship and empowerment of the account team is vital to ensuring customer engagement during service recovery – no matter how capable the account team is. ●

# Is your political research stuck in the phone age?

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# IN FOCUS

**Q** // Survey Monitor



••• socioeconomic research

## Poll charts changes in the haves/have-nots

### Differences fall along expected lines

The majority of Americans, 58 percent, consider themselves to be "haves" in U.S. society, while 38 percent put themselves in the "have-not" group, reports Gallup's Frank Newport. The percentage of have-nots has more than doubled since 1988 but has been more stable in recent years. Meanwhile, the percentage of haves has held fairly constant, except for a single higher reading during the economic boom in 1998.

Americans' responses to this question provide a way of looking at inequality in U.S. society, based on Americans' own perceptions of where they are socioeconomically. The update is part of Gallup's 2015 Minority Rights and Relations poll, conducted June 15-July 10.

The percentage of Americans perceiving themselves to be have-nots rose in the 10 years between the initial 1988 survey and 1998, while the percentage choosing neither dropped. Since then, the have percentage has settled into a tight range between 57 percent and 60 percent. The have-not category has been on more of an upward trajectory, though percentages have fluctuated from year to year.

It is possible that these changes reflect the more difficult economic times ushered in by the Great Recession. It's also possible that the higher visibility of discussions about social inequality has resulted in more people deciding they are on the less fortunate side of the nation's economic divide.

As would be expected, socioeconomic status is strongly related to a person's tendency to place himself or herself in one of these two groups. There are substantial differences between those in high- versus low-income categories and between those with college degrees and those without. Still, only a little more than half of those whose annual household income is less than $36,000 say they are have-nots, along with less than half of those with some college or less.

While all but 5 percent of Americans are willing to place themselves into a have or have-not category in the survey, more than half say they actually don't view the nation in these terms.

In the current survey, 54 percent of Americans say they do not think of U.S. society as being divided into groups of haves and have-nots, while 45 percent do. The percentage of Americans who consider society divided into these two groups has fluctuated over the years but it was significantly lower in 1988 when Gallup first asked the question and slightly lower, on average, from 1998 to 2004 than in the years since. The starkest contrast was in 1988, when 26 percent said that the nation was divided. In 2008, just as the Great Recession was taking a firm hold on the nation's economy, that percentage reached its all-time high of 49 percent.

As might be expected, those who believe the U.S. is divided into groups of haves and have-nots are much more likely to identify themselves as have-nots rather than haves (63 percent to 35 percent, respectively). Those who do



quirks.com/articles/2015/20151103.aspx

not see the U.S. divided in this way are much more likely to place themselves in the have group (64 percent) than the have-not group (36 percent).

There is an interesting pattern in responses to these two questions among whites, blacks and Hispanics. Blacks are much more likely than whites or Hispanics to say they think of the U.S. as being divided between haves and have-nots. But blacks and Hispanics are equally likely to describe themselves as have-nots. These results suggest that blacks are more conscious on a daily basis of inequality in society as a whole than is the case for Hispanics or whites.

The stratification of U.S. society into unequal socioeconomic groups has long been a fixture of philosophic, political and cultural debate. It appears to have remained or even expanded as a fairly dominant leitmotif in the ongoing 2016 election, particularly among Democratic presidential candidates. The results of the two questions reviewed in this analysis show that a majority of U.S. adults do not think of American society as being divided along economic lines, and a slightly higher percentage say that if society is divided, they personally are on the haves side of the equation, rather than the have-nots.

These views are somewhat different than they were in 1988, when fewer Americans thought of the U.S. as being divided, and fewer, when asked, put themselves into the have-not category. In recent years, however, there have not been major changes on these indicators.

Results for this Gallup poll are based on telephone interviews conducted June 15-July 10, 2015, with a random sample of 2,296 adults, aged 18 and older, living in all 50 U.S. states and the District of Columbia. All respondents had been previously interviewed in the Gallup Daily tracking survey and agreed to be recontacted by Gallup. For results based on the total sample of national adults, the margin of sampling error is ±4 percentage points at the 95 percent confidence level. For results based on the total sample of 857 non-Hispanic whites, the maximum margin of

sampling error is ±5 percentage points at the 95 percent confidence level. For results based on the total sample of 802 non-Hispanic blacks, the maximum margin of sampling error is ±5 percentage points at the 95 percent confidence level. For results based on the total sample of 508 Hispanics, the maximum margin of sampling error is ±7 percentage points at the 95 percent confidence level. All reported margins of sampling error include computed design effects for weighting.
www.gallup.com



### ••• advertising research
## Trust in digital ads holds steady

Offline OK too

Researcher Nielsen reports that eight-in-10 global respondents (83 percent) say they completely or somewhat trust the recommendations of friends and family. But trust isn't confined only to those in our inner circle, as two-thirds (66 percent) say they trust consumer opinions posted online – the third-most-trusted form of advertising, according to the firm's Global Trust in Advertising Survey.

"The power of digital ad formats cannot be underestimated, as they offer many advantages for achieving effective reach," says Randall Beard, president, Nielsen Expanded Verticals. "But few brands have mastered online

word-of-mouth marketing techniques, the results of which can go viral very quickly. Passionate brand advocates can be powerful allies to amplify your message but you need to give them a reason to talk. Evolve the relationship from a one-way sales pitch to a two-way conversation. And be transparent and accountable. Online brand advocates can quickly become adversaries with the power to damage credibility and reputation if things go wrong."

Owned (brand-managed) online channels are also among the most trusted advertising formats, Nielsen research found. In fact, branded Web sites are the second-most-trusted format, with 70 percent of global respondents saying they completely or somewhat trust these sites. In addition, more than half of respondents (56 percent) trust e-mails they signed up for.

Looking at two-year digital trends from the firm's studies, trust in paid online and mobile ads has stayed relatively consistent since 2013. Almost half of global respondents say they completely or somewhat trust online videos ads (48 percent, no change from 2013), ads served in search engine results (47 percent, down one percentage point) and ads on social networks (46 percent, down two percentage points). About four-in-10 global respondents trust online banner ads (42 percent, no change) and mobile advertising (43 percent, down two percentage points). Just over one-third say they trust mobile text ads (36 percent, down one percentage point).

"Brands have been steadily increasing their digital ad spend as they get increasingly comfortable with digital advertising and measurement, but TV formats still deliver the highest unduplicated reach [i.e., the ad reaches each audience member only once] of 85 percent-90 percent," says Beard. "While digital ads can offer considerable benefits – such as precision-focused campaigns, in-flight adjustments and more creative options – moving from TV to an all-display digital plan is a bold move for any marketer. Consider a mix of both offline and online channels for the best ROI."

Despite continued media fragmentation, the proliferation of online formats has not eroded trust in traditional (offline) paid channels. TV, newspapers and magazines remain trusted advertising formats. More than six-in-10 global respondents say they completely or somewhat trust TV ads (63 percent), up one percentage point from 2013. Slightly fewer trust ads in newspapers (60 percent) and magazines (58 percent), which fell one and two percentage points, respectively, from two years ago.

Other findings include:

Millennials show the highest levels of trust in 18 of 19 advertising formats/channels, including TV, newspapers and magazines.

Self-reported action based on advertising exceeds trust by more than double digits for ads served in search engine results, ads on social networks and text ads on mobile phones.

Humorous ads resonate most in strongly in Western markets; health-themed ads are rated highest in Latin America; and ads depicting real-life situations are most appealing in Asia-Pacific and Africa/Middle East.

High-energy/action advertising themes resonate more with younger respondents, while pets/animal-centered ads resonate more with older respondents.

The Nielsen Global Trust in Advertising Survey was conducted between Feb. 23 and March 13, 2015, and polled more than 30,000 consumers in 60 countries throughout Asia-Pacific, Europe, Latin America, the Middle East, Africa and North America. The sample has quotas based on age and sex for each country based on its Internet users and is weighted to be representative of Internet consumers. It has a margin of error of ±0.6 percent. The survey is based only on the behavior of respondents with online access. Internet penetration rates vary by country. Nielsen uses a minimum reporting standard of 60 percent Internet penetration or an online population of 10 million for survey inclusion.



••• financial services
## Credit cards still not secure enough

PINs viewed as worthwhile

According to a new study released by the National Retail Federation, Washington, D.C., the majority of U.S. consumers – 62 percent – believe new credit cards being issued by banks don't go far enough to protect card data or prevent fraud.

"Consumers are worried that chip-and-signature cards really amount to chip-and-chance," says NRF Senior Vice President for Government Relations Mallory Duncan. "The chip cards are a step forward but shoppers are concerned that they don't go nearly far enough. Unless the new cards require the use of a PIN, they will only provide half the safeguards needed to stop increasingly sophisticated criminals. The card industry's refusal to give consumers the full protection they want continues to be a huge disappointment."

Among those surveyed, 62 percent said they prefer chip-and-PIN cards over cards that just use chip and signature and 63 percent said chip-and-PIN cards provide more data security than those that don't. Among Millennials, the preference for PIN was even stronger, at 71 percent of those between the ages of 18 and 24 and 66 percent for those ages 25-34.

Contrary to some banks' claim that consumers don't want to have to remember a PIN, the survey found 83 percent of consumers who say a PIN is more secure would consider it worthwhile even if they had to remember a different number for each card.

The survey also found 71 percent of consumers with a credit card have at least one chip card in their wallets but that only 43 percent of credit cards are chip cards since most consumers have more than one card. Only 47 percent of consumers with a chip card have used it in a chip reader.

The online survey of 2,035 U.S. adults ages 18 and older was conducted for NRF Aug. 27 to Sept. 2 by ORC International.

After Oct. 1, the rules changed for how credit card transactions are processed and who is responsible for fraud costs. Under previous credit card industry rules, banks were responsible for fraud losses when a counterfeit card was used and retailers were responsible when the person using the card was not the legitimate cardholder. Now, banks will no longer honor their share of fraud costs if the card used is a chip card and the retailer does not have a chip card reader. Many retailers believe the liability shift is unfair because the chip reduces banks' exposure to fraud while the lack of a PIN leaves retailers exposed to fraud.

The new cards, which banks have been rolling out over the past year, use EMV technology – short for Europay MasterCard Visa – to store data on an encrypted computer microchip. But unlike EMV cards used around the world for more than 20 years, which include a PIN, most cards being issued in the United States continue to use a signature to approve the transaction.

Over the same period, retailers have had to pay for new card readers, which average about $2,000 each when related software, equipment, installation and other costs are included, or an estimated $35 billion nationwide. Most major retailers and many smaller merchants have installed the equipment

but many have reported that activation has been held up by bottlenecks such as delays in having the systems certified by card companies. That puts many retailers at risk for liabilities.

"The chips partially address the issue of counterfeit cards but do nothing about lost or stolen cards because thieves will still be able to sign any illegible scrawl to 'prove' that they are the cardholder," Duncan says. "More importantly, sophisticated criminals can circumvent the chips, so a chip alone is not foolproof. A PIN is a secret password that makes the card useless to a criminal whether the card has a chip or not."

### ••• consumer products
# We still have time to clean the house

## Convenience without compromise

While Americans' lives may seem busier than ever before, they continue to carve out time for housecleaning, according to new research from Mintel. In describing their overall approach to housecleaning, 42 percent of Americans prefer to clean as they go, doing quick cleanups that fit into their schedules, versus setting aside time to give the whole house a thorough top-to-bottom cleaning (32 percent). While consumers value convenience and ease in housecleaning, most are not interested in compromising on effectiveness or results.

Nearly half of adults (49 percent) who personally do housecleaning agree that it's important to take the time to do housecleaning right, with one-quarter (27 percent) agreeing that the less time spent housecleaning the better.

While overall household surface cleaner category sales in recent years have been stagnant, rising just 4 percent between 2009 and 2014 to about $4.7 billion, performance has varied from segment to segment, reflecting changing consumer priorities and preferences. The strongest segments and subsegments in recent years have tended to be the ones that place extra emphasis on simplicity, convenience and quick cleanups and disinfection, including all-purpose cleaners, which saw an increase of five percent between 2012 and 2014, and disposable wipes, which grew 9 percent in the same time period.

Mintel research shows that most American adults get involved in housecleaning on some level, with more than half (52 percent) reporting that they take sole responsibility in their households, and more than one-third (35 percent) say they share responsibility for cleaning with someone else. Pointing to a generational shift in men's involvement in housecleaning, men age 18-34 (52 percent) are almost as likely as women age 18-34 (56 percent) to claim primary responsibility for cleaning in their households.

While the way in which Americans prefer to clean the household has evolved over the years, with greater emphasis on quick cleanups, Americans still spend plenty of time cleaning. Consumers on average spend four hours and 21 minutes cleaning the house in a typical week.

The amount of time men and women report spending is almost equal. Male housecleaners report spending about 38 minutes less per week on average than female housecleaners, consistent with the finding that women remain more likely (61 percent) than men (42 percent) to describe themselves as the primary cleaner in their

households. The relatively narrow gap in reported time spent cleaning is an indication that traditional gender-specific roles for household chores continue to lose relevance. Women age 18-34 report spending the most time cleaning, just over five hours, while men age 55+ report the least amount of time spent cleaning the house, at three hours and 10 minutes.

"Most adults get involved in housecleaning on some level, with many stating they take sole responsibility. Our data indicates a generational shift in men's involvement in housecleaning, as men are almost as likely as women to handle the bulk of the cleaning. The slight difference in time spent cleaning the house as reported by men may be the result of men commenting on the amount of housecleaning they believe they should be doing, as opposed to what they actually do. Either way, the gap remains relatively narrow in reported time spent cleaning between men and women and is an indication that traditional gender-specific roles for household chores continue to lose relevance," says John Owen, senior analyst, household at Mintel.

While they comprise only a small portion of the household surface cleaner market, leading eco-friendly brands posted modest gains of 2 percent in mainstream channels in 2015, according to Mintel research. Their small-scale success may be driven by concern that ingredients in conventional cleaning products can be unhealthy. This belief is held by more than six in 10 housecleaning consumers (62 percent), while 72 percent of consumers agree that natural cleaning products are healthier than conventional ones.

Consistent with the concern that some housecleaning consumers express about the safety of ingredients in cleaning products, nearly one-third (32 percent) of U.S. consumers will pay more for all-natural antibacterial products. Furthermore, nearly three in 10 (29 percent) will pay more for a cloth that cleans surfaces with just water.
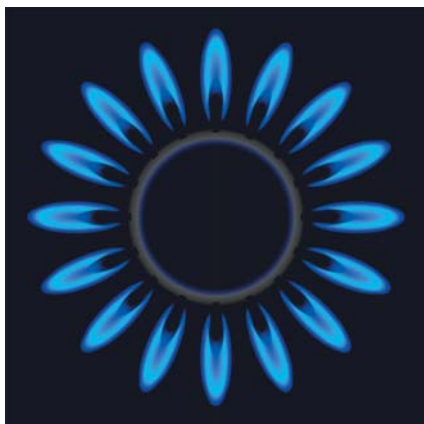
### ••• utilities research

# Satisfaction with gas utilities hits new high

**Stable pricing has helped**

Customer satisfaction with residential gas utilities has increased for a fourth consecutive year, reaching an all-time high, according to a study by Westlake Village, Calif., researcher J.D. Power. The firm's Gas Utility Residential Customer Satisfaction Study, now in its 14th year, measures residential customer satisfaction with gas utility companies across six factors (in order of importance): billing and payment; price; corporate citizenship; communications; customer service; and field service. Satisfaction is calculated on a 1,000-point scale.

Overall customer satisfaction with residential gas utilities has increased by 27 points to 671 from 644 in 2014, continuing an upward trend to an unprecedented level in the study's history. Satisfaction improves across all factors, especially in price (+30 points) and corporate citizenship (+31) from 2014 (620 vs. 590 and 633 vs. 602, respectively). Stable low pricing and familiarity with conservation programs help drive satisfaction with price. In the corporate citizen-

ship factor, satisfaction is driven by customer awareness of their utility's efforts to support economic development in local communities; improve the impact on the environment; and foster public safety.

Although safety awareness has steadily increased by 5 percentage points since 2013, the 2015 study finds there is room to improve, as 72 percent of customers are unaware of their utility's efforts in this regard, and 67 percent indicate they want to hear more about safety. Carbon monoxide is one such topic of interest to customers, with only 4 percent of customers having heard how to avoid it and 33 percent wanting to hear more about it.

"Safety is becoming increasingly important to customers and they look to their utility to provide information that helps keep them safe when using and being around natural gas," says Andrew Heath, director of the energy practice at J.D. Power. "The gas utility industry should ramp up its efforts to make sure more than just 28 percent of customers know about its endeavors to increase safety and to provide actionable advice to customers."

In other key findings:

• Customer service satisfaction has steadily increased during the past three years in the phone and online channels (+30 points and +26 points, respectively).
• The average reported monthly bill amount has decreased in 2015 to $80, down from $81 in 2014 but higher than in 2013 at $75.
• Having an online account setup improves both customer service and billing and payment satisfaction. Customer service satisfaction is 52 points higher and billing and payment satisfaction is 43 points higher among customers who have an online setup, compared with those who don't (779 vs. 727 and 766 vs. 723, respectively).
• The study ranks large and midsize utility companies in four geographic regions: East, Midwest, South and

West. Companies in the midsize utility segment serve between 125,000 and 399,000 residential customers, and companies in the large utility segment serve 400,000 or more residential customers. The following utilities rank highest in customer satisfaction in their respective region:

East Large: New Jersey Natural Gas
East Midsize: Columbia Gas of Pennsylvania and Elizabethtown Gas in a tie
Midwest Large: MidAmerican Energy
Midwest Midsize: Alliant Energy
South Large: Oklahoma Natural Gas
South Midsize: TECO Peoples Gas
West Large: NW Natural
West Midsize: Cascade Natural Gas

The 2015 Gas Utility Residential Customer Satisfaction Study is based on more than 66,000 responses from residential customers of 83 large and midsize gas utilities across the continental United States. The study was fielded between Sept. 2014 and July 2015.

# Product and Service Update

## ••• advertising research

# OOH ad solution uses beacons

### Target consumers on-the-go

San Diego location-based survey firm Gimbal is partnering with York, Pa., mobile billboard and field marketing company do it outdoors to create an out-of-home advertising solution using beacon technology to reach consumers through an integrated smartphone campaign. Beacons will be placed on mobile billboard units owned and operated by do it outdoors, along with other field marketing activation sites. Once a consumer is within the beacon zone (effective from up to 50 meters away), content is delivered to the consumer via push notification within an advertiser's own mobile app or by partnering with a third-party mobile app that introduces a brand to the consumer. Gimbal's beacons support iOS and Android devices and use Bluetooth Smart, geofencing, analytics, security features and privacy controls. Content can be delivered in real-time and can be programmed to only serve messages once or within specific parameters.
www.gimbal.com

## ••• health care research

# Research approach simulates physician decision process

### Focus on complex treatment protocols

New Hope, Pa., health care research and consulting firm RG+A has launched Dynamic Practice Simulation Line of Therapy, a new research approach that is designed to help forecasters predict performance for products with complex treatment protocols that may extend through several lines of therapy. The new approach simulates the decision process by giving physicians a set of realistic patient profiles in a given treatment area, having them treat the patients and receive feedback after each treatment on its effectiveness. Treatment decisions are assessed over three lines of therapy and may include multiple decisions such as induction and maintenance therapy at each point. Physicians then make treatment decisions under two scenarios – the market as it currently exists and a future market after the launch of a new treatment.
http://thinkrga.com

## ••• hispanic research

# Firms debut Hispanic segmentation

### Uses four attitude-based segments

Researcher Nielsen and Culturati Research and Consulting, San Diego, are now offering the Nielsen-Culturati Hispanic Segmentation, which combines Nielsen's Homescan

Panel data with Culturati's attitudes-and-values-based U.S. Hispanic segmentation model. With the Nielsen Hispanic Homescan Panel, four attitude-based segments will be used:

Latinistas (culturally Hispanic) are very traditional and Hispanic-centered, as well as the least focused on blending cultures. One-third of Latinistas are second- or third-generation and more than half prefer to speak Spanish but can use English if needed.

Heritage Keepers (bicultural), while somewhat progressive, are Hispanic-centered and focused on preserving their heritage. Most (86 percent) Heritage Keepers are first-generation Hispanics and prefer to speak Spanish.

Savvy Blenders (bicultural) are very progressive, embrace diversity and are focused both on preserving their heritage and blending cultures. Savvy Blenders are bilingual and their language preference is highly situational. While this segment has a strong second-generation population, at 49 percent, it is quite diverse with first-generation accounting for 29 percent and third-generation accounting for 22 percent of the segment.

Ameri-Fans (culturally American) are progressive, with a diluted Hispanic heritage and are closest to the average mainstream consumer. The majority (82 percent) is second- or third-generation and prefers to speak in English.
http://culturatiresearch.com

## ••• customer experience

# Questback launches new dashboard

### Help with sharing of feedback data

Oslo, Norway, researcher Questback now offers its MySight dashboard, which is designed to speed the connection, analysis and sharing of feedback

data, link it to enterprise systems and measure against business KPIs. The new dashboard is made up of two components, including MySight DataFlow, which extracts, transforms and loads data from any specified source to allow businesses to bring together their customer experience, marketing, market research and other data in a single place. The dashboard then allows managers to visualize and explore the data to create interactive reports and enables organizations to combine data from different feedback initiatives like voice of the employee, voice of the customer and employee engagement initiatives and provide a picture of overall organizational performance.
www.questback.com

### ••• location-based research
# Confirmit adds beacon-triggering solution

### Capture in-the-moment behavior

Confirmit, Oslo, Norway, has developed a location- and beacon-triggering solution that allows users of Confirmit Horizons to use mobile, location and beacon technology to better understand and act upon in-the-moment customer behavior as part of a voice of the customer, voice of the employee or market research program. The solution captures location events through geofencing or beacon technology and identifies when a mobile device is near, has entered or exited a specific location or is close to a key location such as an in-store display. By building rules based on combinations of these location events, customized messages or surveys can be sent to customers or panelists via a fully-branded app. It allows business to maintain control of when and how next-step actions are deployed.
www.confirmit.com

### ••• research platforms
# Analytics platform from YouEye

### Create video highlight reels

Mountain View, Calif., research company YouEye has created a new prescriptive analytics platform that enables marketers to design and program studies, source panels and execute research projects and also automates coding and analysis. Marketers can design and program a study using research best practices and methodologies and researchers can source studies, identify desired demographics, integrate their own panels or use participants from panel management companies. The platform also codes video results automatically using a framework, technology stack and methodology to create short video highlight reels and generate data that can be viewed on a dashboard. It also allows users to conduct follow-up research using data generated during the initial study.
www.youeye.com

### ••• Briefly

■ G&R, a communications research company located in Pennington, N.J., has opened an in-house neuromarketing research lab focused on facial electromyography (fEMG) and its applications in evaluating emotional response to advertising, Web sites and product design. The lab provides a facility for companies interested in learning about neuro-physiological measurement and conducting full-service neuromarketing studies. It is also available for researchers interested in using the space and equipment to administer fEMG studies themselves.
www.gandrllc.com

■ Evanston, Ill., research firm E-RM has developed a compact, full-service hybrid research service for innovators, entrepreneurs and VCs to assess market viability of new consumer products. Called Q3MA, it uses consumer panel services to gather pinpointed quantitative and qualitative feedback to diagnose a new consumer product's prospects for nationwide growth or market expansion.
http://your-research-resource.com

■ Denver-based mobile survey platform GeoPoll and London media and marketing insights firm Kantar Media have collaborated to create Kantar-GeoPoll Media Measurement in Africa. The product builds on GeoPoll's media measurement service by adding Kantar Media's research and technology tools to GeoPoll's mobile data collection methods. The joint product will refine the mobile data methodology that GeoPoll has used to collect daily audience data.
http://research.geopoll.com

■ Los Angeles audience and insights platform Instantly and New York-based entertainment marketing and rewards platform Viggle Inc. have partnered to measure the impact of mobile advertising within the Viggle app. Additionally, Viggle users can earn Viggle points by participating in market research and ad effectiveness studies supplied by Instantly and be redeemed for various rewards including movies, television shows, music and other rewards.
http://viggleinc.com

■ Madison, Wis., software firm Digsite has launched a new version of its social media-inspired tool for online market research. The research platform gives businesses and agencies a method for engaging with customers in private online communities to gather insights to inform business decisions, marketing and product development. The new update includes automatic screen resizing, enhanced audio, video and photo uploads, augmented survey tools to support

multiple question types and other engagement features like comment tracking and notifications.
www.digsite.com

■ Scotland-based qualitative research software provider Quirkos has released an updated version of its software, offering new features and enhanced performance, including a PDF import feature, improved performance for large projects, report generation and styling and a new visual look. Quirkos says it has also fixed numerous bugs and activation issues.
www.quirkos.com

■ Irvine, Calif., survey incentive firm txtMovies celebrated its second year of operation by relaunching its survey incentive platform on its new Web site which incorporates responsive design practices and enables an optimized mobile experience.
www.txtmovies.com

■ Danbury, Conn.-based IMS Health launched IMS Health Insights, an app that allows life science and health care decision makers to locate and download IMS Health research and white papers. Content on the app dates from early 2014 and is continually updated.
www.imshealth.com

■ 42 market research, a health care research provider based in Dubai, United Arab Emirates, has launched its new health care panel for pharmaceutical research in the Czech Republic, allowing the company to offer its medical research services in the Czech Republic with potential panelists consisting of physicians, dentists, pharmacists and opticians.
www.42mr.com/en

■ Think with Google, Google's marketing research arm, has unveiled Travel Dashboard, a free online tool that uses Google data to highlight trends across car rental, air and hotel verticals in the U.S. The data is updated quarterly and is intended to help marketers in plan-

ning their campaigns.
www.thinkwithgoogle.com

■ New York media and technology platform Xaxis now offers Xaxis Viewpoint in Asia Pacific, a programmatic product that gives advertisers 100 percent viewability in Asia-Pacific. Advertisers are only charged for ads that are viewable according to the Media Rating Council and Interactive Advertising Bureau. These standards will help advertisers use viewability to measure the effectiveness of their campaigns.
www.xaxis.com

■ Ahalogy, a Pinterest-focused marketing company based in Cincinnati, has launched Liftwords, a technology that allows marketers to optimize their content on Pinterest by leveraging specific keywords to drive performance on Pinterest. Liftwords suggests keywords in real time as marketers pin content based on Ahalogy's content and trend data.
www.ahalogy.com

■ Chicago research firm IRI has created IRI On-Premise Advantage, a CPG industry-based point-of-sale projected tracking service for the on-premise marketplace, including establishments where food and drinks are consumed where purchased, like bars and restaurants.
www.iriworldwide.com/en-US/home

■ U.K.-based firm DJS Research has launched alumnus, a market research offer that allows universities and other establishments to benchmark their alumni relationship metrics against other institutions and to determine a segmentation, which can be applied across the entire alumni database. It also lets higher-education institutions establish key drivers of alumni engagement and contributions.
www.djsresearch.co.uk

■ Ipsos Healthcare has launched a syndicated Molecular Diagnostic Monitor that focuses specifically on hematologi-

cal malignancies and measures and tracks the usage of companion diagnostics and other tests across a range of leukemias and lymphomas. It currently covers the U.S. and will be rolled out in other markets shortly.
www.ipsos.com/marketing/healthcare

■ Dallas-based Worldwide Market Research Inc. now offers specialty panel-building and management as a new service, targeting small and mid-sized business, scientific and research associations who need a scalable way to reach their audiences for market research.
www.worldwidemr.com

■ London-based consumer goods company Unilever has signed a new deal with Dublin-based mobile marketing company Brandtone to enable its brands to use mobile and big data to build relationships with consumers, particularly in emerging markets. As part of the deal, Unilever will support Brandtone's expansion into four new markets, including India, China, Indonesia and the U.S. and build on existing relationships.
www.unilever.com

■ U.K. research agency YouGov has partnered with DigitalMR, a research firm also based in the U.K., to offer communities 247 in Iraq. The communities 247 platform by DigitalMR is equipped with a range of marketing research and communications tools and allows companies worldwide to recruit consumers for market insights, co-creation, activation and customer advocacy.
https://today.yougov.com

■ Finland-based data network and telecommunications equipment company Nokia Networks has launched two analytics services, Ad Analytics and Big Data Consultancy. Ad Analytics extracts data from operator networks, anonymizes it, analyzes it according to target segments specified by the advertising agency and enriches it with location

data from maps and demographic data from public sources. Big Data Consultancy builds off of Nokia's existing analytics and knowledge in big data architecture, network data insight, analytical modelling and value realization approach to help operators reduce costs, improve customer experience and grow subscriber revenue.
https://networks.nokia.com

■ Warren, N.J., researcher Lightspeed GMI has expanded its survey programming platform, QuestionArts, into all of Lightspeed GMI's operating markets, led by Jon Puleston, vice president of innovation. The firm also made additions to its survey design leadership team, including Melissa Moxley, who was appointed as global product lead, and Steven Walsh as global technology lead.
www.lightspeedgmi.com

■ Leominster, Mass., research firm Jibunu now offers Client Adjustable Testing Environment, or CATE, a tool that allows customers to control their survey-testing environment. CATE gives testers more survey flow and variable control and adds visibility to their surveys. The functionality applies to both respondent-visible and back-end analytic elements. CATE allows for a more efficient testing process and provides additional methods for confirming the accuracy of programming and data structure. Separately, Jibunu has launched CLONE (Consistent Layout, Only New Elements), a methodology that sets up survey elements so they can be easily copied, or cloned, for future use. CLONE comes in three offerings, including standard, custom and advance, each with its own features.
www.jibunu.com

■ Reston, Va., media measurement firm comScore has made its Xmedia solution widely available in the U.S. The measurement solution allows

users to create cross-media packages that combine properties from TV and digital to analyze audience reach and engagement across platforms.
www.comscore.com

■ Costa Mesa, Calif., firm MFour Mobile Research has added Amazon gift cards as an additional instant mobile payment option for its Surveys on the Go application. The option expands choices for panelists to cash out once they hit the $10 benchmark.
http://mfour.com

■ Waltham, Mass., analytics firm Affectiva and eye-tracking firm iMotions, Boston, have partnered to make Affectiva's Affdex facial coding and emotional analytics software available on the iMotions Biometric Research Platform, allowing human behavior researchers to combine facial coding and emotion analytics with eye-tracking, brainwave measurement (EEG) and physiological sensors with traditional surveys and questionnaires, which are also fully integrated.
www.affectiva.com

■ Stamford, Conn., sports and entertainment intelligence firm Repucom has launched its World Golf Survey, a survey of the global golf community that will describe golf's current commercial landscape around the world, from participation to viewership, and examine key trends shaping professional golf in the future, notably its inclusion in the Olympic program in 2016.
http://repucom.net

■ South Jordan, Utah, research firm MaritzCX has completed the unification of its software platform to create its new MaritzCX platform. The SaaS-based platform is powered by big data technologies that deliver insights for CX programs. It is designed to enable organizations to increase customer retention, conversion and lifetime value by

collecting omnichannel customer information, analyzing the data, turning it into a view of the customer experience and making it available to everyone in the organization. Customers' data is protected locally in their operating country through the use of data centers.
www.maritzcx.com

■ U.K.-based payments processing technology firm Worldpay has debuted Insights Services, its big data analytics proposition that uses Worldpay's payment information to allow retailers to better understand aggregated consumer spend and preferences, both online and in-store. Worldpay data gives customers a market perspective of consumer spending patterns and loyalty behaviors at a national and local level by sector, payment type, channel and time of day. The service can act as a standalone solution or complement existing CRM and loyalty systems.
www.worldpay.com/us

■ U.K. research agency BrainJuicer has launched ComScan, a System 1 communications testing methodology that allows for an overnight understanding of a piece of creative's emotional resonance. ComScan facilitates quick screens, checks and iterative tests/re-tests of creative ideas to aid in media planning and spend guidance while keeping the focus on emotion as the only driver of marketing.
www.brainjuicer.com

■ Oslo, Norway, researcher Confirmit has released version 19 of its Confirmit Horizons solution for customer experience, voice of the employee and market research. The latest version has ease of design and deployment across channels and analytics and reporting in multiple formats.
www.confirmit.com

■ Australia-based digital out-of-

home media company Inlink has created a real-time audience measurement and analytics platform that gives clients and agencies information on the reach and effectiveness of their brand campaigns. The platform uses Wi-Fi technology to count footfall volumes, dwell time and proximity of people to specific locations. It captures data points to provide a view of people-traffic volumes and provide analysis of trends and traffic behaviors and offer campaign-specific reach and frequency information using current data.
www.inlink.com.au

■ Little Rock, Ark.-based data marketing company Acxiom has partnered with Australia-based Roy Morgan Research and major media agency groups to give marketers an increased capacity to

find and target their audiences on Facebook. Advertisers can access views of their customers using Roy Morgan and Acxiom data and bring media planning and buying in line with their cross-channel objectives. Dentsu Aegis Network and OmnicomMediaGroup are first to market with this solution, with campaigns set to go live this week.
www.acxiom.com

■ Austin-based research firm Kinesis Survey Technologies has launched the Advanced Recruitment Source Report, the first in a series of reporting tools available within the Kinesis Panel platform. It allows panel managers to identify their most valuable panel sources and adjust compensations accordingly, providing a financial model for Kinesis' clients. It also offers customized configurations via a

drag-and-drop interface, so each panel may design according to its needs. Kinesis plans to roll out additional reporting tools during Q4 2015.
www.kinesissurvey.com

■ Aki Technologies, a San Francisco-based mobile advertising platform, is now available. The platform, founded by Scott Swanson and Alvaro Bravo, connects marketers to consumers during the times they are potentially most receptive to advertising. Aki's Mobile Moments Index analyzes mobile activity data points that assess a consumer's ad receptivity at a given time, allowing advertisers to target consumers when they are most likely to engage with an ad and deliver the ad format that best aligns with their level of receptivity at that moment.
http://a.ki

# The importance of setting and meeting survey respondent expectations

| By Michael Latta

## snapshot

Michael Latta draws on his own study of health care practitioners and previous studies to show the value that respondents place on knowing what to expect from the survey-taking process.

Research incentives and response rates in surveys have gained in importance, especially as response rates decline. This article looks at a study on setting and meeting expectations, incentive amount and time involved in research participation as factors affecting willingness to participate in future health care marketing research. The results show that expectations and incentive amount do increase willingness to participate in future marketing research. The results also show that setting and meeting expectations is three-and-a-half times more important than incentive amount in encouraging willingness to participate in future marketing research. No impact of length of research session was indicated. These results have implications for building panels of research participants and future response rates.

Many practitioners and industry organizations have addressed the topic of incentives and response rates. For example, the Council of Professional Associations on Federal Statistics held a conference in 2010 dealing with the issue of whether incentives are necessary. That same year, a study by Glaser for the Marketing Research Association (MRA) reported that federal and state governments were trying to curtail the influence that pharmaceutical, biotechnology, medical device and medical supply companies may gain through the use of incentives in marketing research. A total of 576 physicians from various specialties participated in an MRA-sponsored Web survey to gather opinions on the importance of incentives in recruiting and cooperation. The results showed that nine out of 10 physicians said that incentives play a role in gaining participation and less than one in 10 said that they would participate if no incentive were offered.

Qualitative research indicates three main reasons respondents give for responding to surveys: wanting to be helpful; money or other economic incentives; and an interesting topic or trust of a sponsor.

A meta-analysis by Church showed effects of incentives on response rates in cross-sectional mail surveys, with prepaid incentives being stronger than promised incentives or no incentives. Monetary incentives were found to be stronger than gifts and more money is stronger than less money. In an experiment on cellphone use and incentives by Brick and colleagues, a promised incentive of $10 led to a higher screener response rate than a promised incentive of $5 and also led to a higher cooperation rate to the survey overall.

More recently, an experiment was conducted by Singer and Ye in the online environment using four different formats with an eBay customer list of over 1,900 respondents. Recruiting was done by e-mail invitation that had a link sending respondents to a seven-minute online survey. The four-cell design included incentives and cosmetic features such as color, shading and HTML tables in the survey. This design was set so that the expected value of each combination of design features and incentive amount was the same. Completion rate was defined by the number of respondents divided by the number

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of people who viewed the first page and went no further. Data quality was defined as accuracy of responses to questions about purchases on eBay linked back to purchase history data provided by eBay. These data indicate incentives increased completion rate and had little or no effect on data quality. Results for satisfaction were not as strong as those reported in a 2003 IMRO study (65 percent vs. 70 percent) when incentives were present but still showed incentives enhanced overall satisfaction by 9 percent.

These studies are limited in the size of incentives offered and the number of research methodologies included, with online dominating. They also have limited variability in respondent types included and in length of required participation. They do not address the issue of respondent attrition from unpleasant research experiences such as not meeting expectations created in recruiting. The question still stands: Why are response rates of experienced respondents declining?

### Current study design

To broaden the range of levels of design variables and analytic variables, the current study of includes the design in Table 1.

Both qualitative and quantitative approaches were included in the sample of 729 respondents. The four methodologies, two qualitative and two quantitative, were phone surveys, self-administered surveys, focus groups and in-depth interviews. There were seven different respondent types including pharmacists, child/neuropsychiatrists, consumers, FP/GPs, IMs, nurses and pediatricians. The four census regions were Northeast, Midwest, South and West.

Independent variables included:

• incentive size in dollars, which ranged from $5 to $250 depending on respondent type and the project methodology;
• the time of participation in minutes, which ranged from two to 120 minutes; and
• meeting expectations set during recruiting (time, incentive size and

Table 1: Design variables, independent variables and dependent variable

| Design Variables | Four Research Methodologies |
| --- | --- |
| | Seven Respondent Types |
| | Four Census Regions |
| Independent Variables | Time of Participation in Minutes |
| | Incentive Size in Dollars |
| | Meeting Expectations |
| Dependent Variable | Willingness to Participate in Future Marketing Research |

Table 2: Number of respondents in each level of willingness to participate

| | N | % |
| --- | --- | --- |
| Definitely Would Not Participate | 10 | 1% |
| 2 | 19 | 3% |
| 3 | 15 | 2% |
| 4 | 9 | 1% |
| 5 | 74 | 10% |
| 6 | 15 | 2% |
| 7 | 50 | 7% |
| 8 | 76 | 10% |
| 9 | 91 | 12% |
| Definitely Would Participate | 370 | 51% |
| Total | 729 | 100% |

survey topic), which was measured on a 10-point scale where 1 = much worse than expected and 10 = much better than expected.

The dependent measure, willingness to participate in future marketing research, was measured on a 10-point scale where 1 = definitely will not participate in the future and 10 = definitely will participate in the future.

### Results and analysis

The study was completed over a calendar year. The distribution of willingness to participate in future marketing research appears in Table 2. The analysis utilized the whole sample since there are pockets of constant values in a methodology and missing values for some of the main variables in the overall design. The independent and dependent measure descriptive statistics are in Table 3. The correlations among the independent and dependent measures are in Table 4.

A stepwise multiple regression analysis was done using future participation in marketing research as the dependent variable and meeting

expectations, incentive size and time as the independent variables. The final model showed meeting expectations and incentive size were significant predictors of future participation but time of participation was not. The results of this analysis are presented in Table 5.

The adjusted r-squared for the two-predictor model was .403. The coefficients of the two-predictor model are in Table 6.

The regression equation is:

Willingness to Participate in Future Marketing Research = .588* Meeting Expectations + .166* Incentive Size + Error

### Conclusions

A meta-analysis by Groves and Peytcheva of nonresponse rates and nonresponse bias showed that research design and sample characteristics predict both nonresponse rates and bias. The current study shows meeting expectations is more important in encouraging future participation in marketing research projects than either time of participation or incentive size. The size of the standardized coefficients indicate that setting proper expectations and

Table 3: Descriptive statistics for independent and dependent measures

| Descriptive Statistics | Mean | Std. Dev. | N |
|---|---|---|---|
| Future Participation | 8.32 | 2.334 | 729 |
| Meeting Expectations | 7.69 | 2.101 | 729 |
| Incentive Size | $68.16 | $72.903 | 729 |
| Time of Participation | 34.81 | 41.685 | 729 |

Table 4: Correlations of independent and dependent measures

| | Future Participation | Meeting Expectations | Incentive Size | Time |
|---|---|---|---|---|
| Future Participation | 1.000 | .615*** | .259*** | .204*** |
| Meeting Expectations | .615*** | 1.000 | .158*** | .113*** |
| Incentive Size | .259*** | .158*** | 1.000 | .929*** |
| Time of Participation | .204*** | .113*** | .929*** | 1.000 |

Table 5: ANOVA summary of regression analysis of future participation on meeting expectations, incentive size and time of participation

| | Sums of Squares | df | Mean Square | F | Significance |
|---|---|---|---|---|---|
| Regression | 1604.29 | 2 | 802.14 | 246.70 | .0001 |
| Error | 2360.60 | 726 | 3.25 | | |
| Total | 3964.89 | 728 | | | |

Table 6: Regression coefficients and significance tests

| | Standardized Beta | t | Sig. |
|---|---|---|---|
| Constant | 0 | 11.523 | 2.48E-28 |
| Meeting Expectations | 0.588322198 | 20.28718 | 7.78E-73 |
| Incentive Size | 0.166288566 | 5.734148 | 1.44E-08 |

then meeting those expectations for respondents appears to be three times more important than incentive size in getting potential cooperation for future participation. Because setting the expectations about the time of participation in minutes and the incentive size in dollars during recruiting is part of meeting expectations, it's perhaps not surprising that meeting expectations is such a powerful predictor of future participation in marketing research.

In their work on physicians' views of marketing research, Maciolek and Palish indicate that financial incentives are the primary reason for participating in online surveys 51 percent of the time. They note that physicians suggest marketing researchers should make as their No. 1 goal to "abide by the participation agreement (survey length,

topic)," suggesting we need to meet expectations consistently that are created in recruiting.

Because the results are also consistent with the norm of reciprocity, they may apply to a wide variety of respondent types, research methodologies and honorarium amounts. The norm of reciprocity says people will respond favorably to each other by returning benefits for benefits and responding with either indifference or hostility when people are harmed or benefits are not forthcoming as promised. An underlying norm of reciprocity is a powerful engine for motivating, creating, sustaining and regulating the cooperative behavior required for self-sustaining social activities such as health care marketing research as well as for controlling the damage done by unscrupulous research suppliers.

In conclusion, setting and meeting expectations about things such as incentive size and the time of participation when recruiting participants for research projects should be a focus in both federal surveys and marketing research projects in health care and other industries. Meeting expectations and providing incentives are two important aspects of the marketing research process that affect the respondents' post-project evaluation of the whole experience. Violating expectations may kill future participation and endanger recruiting and retention for marketing research panels. Ⓞ

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# The impact of gamifying to increase spontaneous awareness

| By Pete Cape

**snapshot**

A research-on-research test showed that questionnaire wording can be fertile ground for adding gamification to surveys.

**M**uch has been written about the potential for gamification in online questionnaires to improve the quality of results. But the focus has usually been on gaming elements which use graphics, virtual reality, avatars and the like. Is it possible to harness the power of gaming psychology within a more traditional questionnaire design – by using different wording alone? Does a gamified survey question perform better than one using standard wording? Specifically, can gamification like this increase spontaneous brand awareness? This was the test we conducted with members of our firm's U.K. online panel.

In face-to-face and telephone surveys the interviewer is instructed to probe at the end of a spontaneous awareness question by saying "Any others?" This instructs the respondent that their task is not yet over and they should search their memory for more answers.

Transferring the same question text to an online setting loses this prompt. While we generally get more answers in an online setting anyway (since the respondent has more time to think) how do we know that we have exhausted the respondent's recall?

By turning the question into a game we put in place rules that stimulate the respondent to keep going until they can name no more. Does the gamified survey question perform better than the standard one? We fielded a matched sample of U.K. respondents from SSI's online panel to test this.

Shown in the box in Figure 1 is the gamified survey design. Notice how we allow 10 boxes per respondent, not one. Not only does this make coding easier but it also allows respondents to assess their performance quickly and see how much further they need to go to compete the game.

Consider the question. We are very clear that this is a game. Since the rest of the survey was not 100 percent gamified it is necessary to do this to avoid having the question appear to be somewhat strange. In the question we set the rules and the objective (60 seconds to write down all) and the criteria for winning (getting 10). Before the respondent has time to think about how silly this might actually be, or to decide not to play our game, we are off: "Your time starts now!" We do not actually run a timer or close off the question after 60 seconds since this would add unnecessary pressure (and potentially reduce our data set). Remember, this is not actually a game.

Note also we give the respondent feedback after the question. This is motivational on two counts. First it is feedback as to competence – we are telling the respondent they did it well. Whether they did so or not, on an absolute basis, does not matter; they will never know and it is still motivational. Secondly it hints that someone is taking notice of what they are doing, as they do it. The fact that it is a computer does not really matter.

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Figure 1: Example of Gamified Survey Design

T4a Thinking now just about mobile phones, here is a little game. You have 60 seconds to write down all the brands of mobile phones you can think of, to a maximum of 10. Your time starts now!
10 OPEN BOXES, SINGLE LINE EACH
+ Can't think of any
COUNT BOXES WITH SOMETHING IN THEM
IF COUNT > 0
Well done, you got <COUNT> brands. It's not easy when you are under time pressure, so well done.

| Brand | Gamified | Non-gamified | Gamified | Non-gamified |
|---|---|---|---|---|
| BASE | 309 | 302 | Rank | Rank |
| Samsung | 78% | 64% | 1 | 1 |
| Apple | 71% | 61% | 2 | 2 |
| Nokia | 67% | 46% | 3 | 3 |
| HTC | 40% | 27% | 4 | 4 |
| Sony | 34% | 28% | 6 | 5 |
| Blackberry | 36% | 22% | 5 | 6 |
| LG | 31% | 19% | 7 | 7 |
| Motorola | 29% | 17% | 8 | 8 |
| Huawei | 10% | 5% | 9 | 10 |
| Microsoft | 6% | 6% | 13 | 9 |

So does it work? In a standard version of the survey, respondents name, on average, 3.9 mobile phone brands. In the gamified version this goes up to 5.9. So we certainly get more brands being mentioned – a 50 percent increase in fact.

But what extra brands? If it were simply the case that the respondent dredges up some obscure brand, then the gamification may have little point – the top brands would remain top and have the same awareness. But they do not come up with multiple obscure brands: A total of 59 different brands were recalled in the gamified survey, 51 in the standard version. It is recall of the top brands that increases (see chart).

One can almost imagine the respondent to the standard survey giving their four answers and feeling that enough work has been done. With no interviewer to probe "Any others?" they move on. They have satisfied the task, just not optimized their performance. Almost all the additional brand mentions are among the best-known brands. The ranking does not substantially change.

The differences in the levels of awareness are substantially different, however, and any researcher contemplating changing the question text of a tracker should be prepared to deal with the step-change in the data that will occur. That would be the cost. And the benefit? That would be that the data is better. It is more of the truth and therefore will be more explanatory.

It is worth noting as a final point that respondents in our study were willing to "play" the game. The level of "don't know any brands" is exactly the same between the two versions of the survey.

The conclusion is that gamification, simply using text, clearly works to extract more brand information from the average respondent than a traditional open question. When considering gamifying a survey to improve the quality of results, graphics, video and virtual reality are not the only potential tools. Gamified wording alone can make a powerful difference. ⓿

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# Keeping pace with the change

Adapting research panels and communities for a mobile environment

| By Paul Hudson
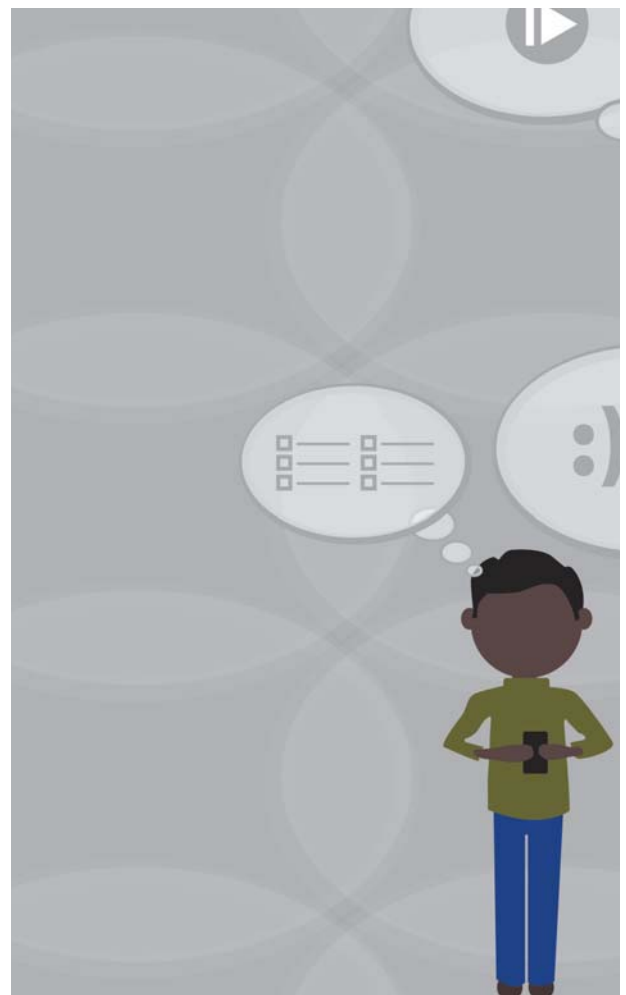
### snapshot

Panels and communities can benefit from incorporating smartphone-based mobile data-gathering approaches but there are several points to consider when doing so. And don't forget about tablets!

The Pew Research Center recently estimated that 64 percent of Americans own a smartphone, while 7 percent of the population are dependent on their mobile device to access the Internet.[1] Similarly, eMarketer projects that by 2018, 2.56 billion consumers will own a smartphone – over one-third of the global population.[2]

It is difficult to ignore statistics like these. We are constantly told that mobile is the future, whether it is the future of communication, marketing, fitness or even research. Combine that with the Google search algorithm update dubbed "Mobilegeddon" and businesses have been whipped into a mobile frenzy. But there must be a point where we stop and consider mobile research in context: its advantages and its weaknesses in full.

So, how exactly does mobile research stack up? The advantages are clear. In-the-moment feedback ensures organizations are able to conduct research in a range of scenarios and gather the instant raw emotion a customer feels, unclouded by time or memory. Similarly, mobile research is adaptable to a range of locations. We can ask participants to carry out tasks, visit places or purchase an item all while recording their thoughts and feelings.

Of course, there are more benefits to mobile research than just these. We have barely scratched the surface. From the speed of insight to the responsiveness and programmatic nature of research design, mobile has a lot to offer. The reasons we conduct mobile market research extend far beyond the physical into the realm of consumer behavior.

## Start by questioning why

To understand these behavioral benefits, we must start by questioning why panels and communities should be mobile in the first place. The most obvious benefit to portable market research is the ability to conduct in-situ research. In-situ is a Latin phrase that translates literally to "on-site." And that is exactly what mobile panels and communities offer – the opportunity to conduct research in any location, at any time.

quirks.com/articles/2015/20151107.aspx
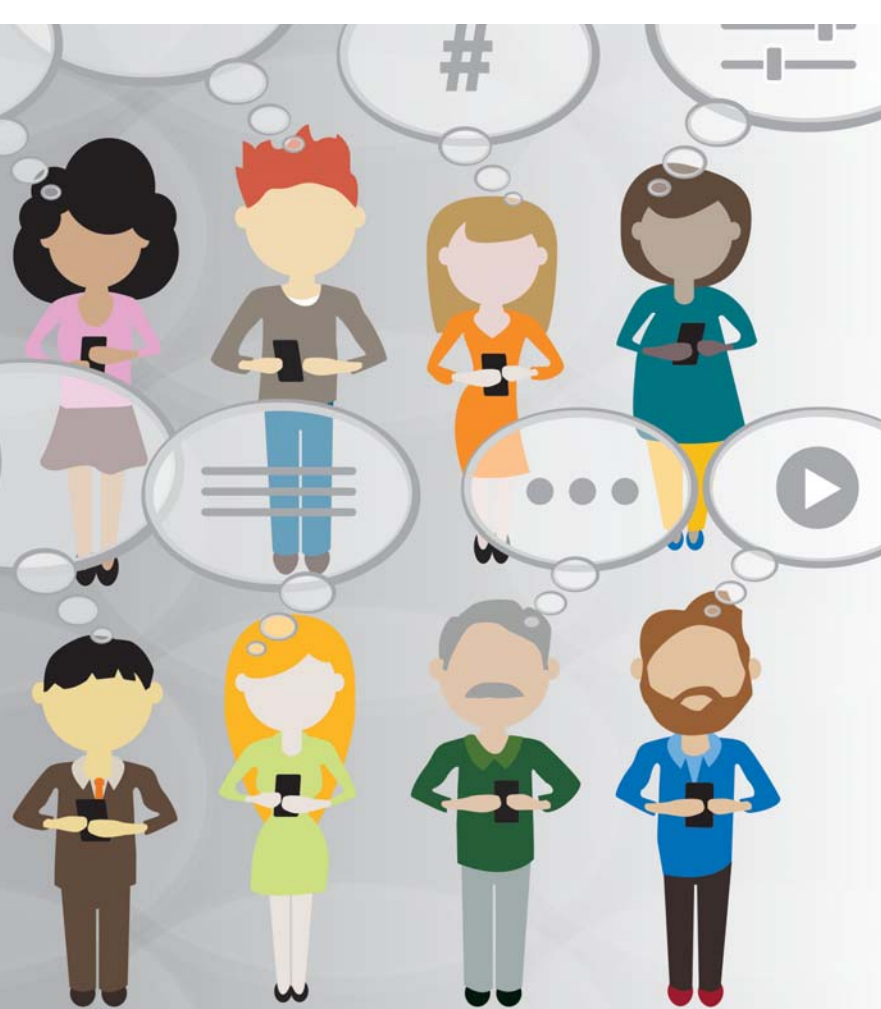
Imagine a participant signs up to your research panel to provide feedback on a brand. The following day, they walk in to their local supermarket. A push notification from their smartphone prompts them to answer a few short questions about the brand (through either geofencing or beacon technology): Where is it located in the store? How easy was it to find? Is it where the customer expected?

By asking these types of questions in a real-life scenario, we as researchers can gather rich, emotive feedback from that exact moment in time. It is an accurate representation of participants' feelings, not clouded by time or memory. The same can be applied to online communities – prompting participants to document their experiences with a service or brand in-the-moment and supplemented with discussion-provoking media (photo, video and audio).

There are two key behavioral scales that define the difference between participant behavior when using desktop and mobile devices. The first is the degree of focus. Participants completing mobile research have, on average, a significantly shorter attention span than those using desktop devices. This is, for the most part, due to the activities surrounding mobile usage. Consumers will use their phones while walking, on the bus, shopping, working or any number of other activities. Desktop users, on the other hand, are usually solely focused on the task at hand.

So what impact does this have? It means that panels and communities must be designed with the device in mind. A panel survey consisting of only four to five questions is a wasted opportunity. The same survey delivered on a mobile device is the perfect way to capture a short burst of feedback – framed by that exact moment in time. Conversely, a long survey delivered on mobile will suffer high dropout rates due to a lack of engagement but the same survey delivered on a desktop offers space for detailed, reflective feedback.

The second behavioral scale that causes radical differences between mobile and desktop responses is the proximity to the measured behavior. Mobile panels and communities are tools that can be applied in-the-moment. Their desktop counterparts are far removed from the situation and thus more suited to detailed but reflective and measured feedback.

The most effective panels and communities will take into consideration the differences in device-oriented behaviors and use them as an advantage. For example, an FMCG panel may ask a few short questions via mobile in-store for emotive, in-the-moment feedback. This could then be contrasted with a second, more detailed survey delivered at a later time via desktop.

Research conducted in such a manner benefits from the advantages of both delivery methods. In addition, it is capable of understanding how opinion is affected by the passage of time (thus creating multiple tiers of insight). This is where the future of both the online customer panel and community lie. But to achieve it requires integration into all aspects of the research design.

## App or Web?

The first step in designing mobile-enabled panels and communities should always be the decision between app and Web designs. There are (broadly speaking) two distinct types of research space: responsive Web sites and dedicated mobile apps. The choice of delivery method will have an impact on results. Web-based research is easier to initially access, requiring only the Web address and log-in details. However, this type of research requires a stable Internet connection as it needs respondents to return to the site each time a new task is posted.

Mobile apps require more initial setup, as users must find the app and then install it on their device. They are also significantly more expensive to produce. However, once it has been downloaded, participants can access it with ease and data can be stored offline. The current standard is that for infrequent projects, an online responsive Web site is used, but for long-term frequent research, a mobile app is a better investment. However, the future is more than likely to be a hybrid of the two.

Although both aim to achieve the same result, we must place experience at the heart of our research design. The simple truth is that participants do not have a single unified preference – some will prefer to use an app, others will prefer a Web site. To maximize response rates and avoid alienating participants, the choice must be offered between the Web site and app. Once participants opt in to a particular delivery method, they will be more engaged and more receptive to frequent prompts.

## The short survey is king

Once a suitable research space has been created, the next priority is to ensure a mobile-friendly

design. Best practices for creating mobile panels include keeping surveys short and frequent. Researchers must recognize that mobile respondents have a significantly shorter attention span than online or in-person participants. Thus, in the world of mobile, the short survey is king. Instead of creating a single long task, break it up into a number of shorter ones for better response rates.

In addition to this, keep text to a minimum. In-situ research works best when participants are in the moment. Long questions or descriptions will break this moment and cause participants to focus on the research, rather than the experience or emotion in hand. Similarly, text should be large so that it can be read from a distance. Both buttons and text boxes should be large and spaced apart – enough so that they cannot accidentally be tapped.

Be sure to avoid elements that break the in-situ immersion and distract consumers. These kinds of elements include image and video stimuli, as well as JavaScript and other technical tools. In short, keep it simple, easy to use and easy to understand.

## More of a challenge

Research communities pose more of a challenge. Inherently, these are more interactive and discursive in nature and cannot be simplified to the extent of a panel. There are still, however, a number of elements which can be tailored to enhance the mobile experience. To capitalize on these, it is first important to ground UX design in the objectives a community sets out to achieve.

An online market research community is a collaborative tool designed to stimulate participant interaction. In fact, the less moderator involvement there is, the higher quality the feedback will be. Research communities walk a thin line – they rely on participant engagement and interaction but this is often encouraged by prompts and incentives rather than a genuine desire to participate. It is this issue that mobile delivery can help overcome.

There are two major design elements that can improve community engagement. The first is the integration of push notifications. By using geofencing and beacon technologies, participants can be prompted to provide in-the-moment

thoughts and discussion points when in particular locations. Another use of notifications is to notify participants that others have replied to their comments. By receiving real-time notice of the evolving discussions, participants are more motivated to engage in the research and actively drive the conversation forward.

The second mobile design consideration that can drastically improve community autonomy is the application of rich media. Rich media can be anything from photos to videos, audio clips, emojis and drawings. The essence of an online research community is equipping participants with the means to express themselves. Smartphones provide ample opportunity to do so. This freedom of expression gives participants control over the direction and format of the feedback and in turn fosters an engaging discussion.

In addition, the technical considerations that are applicable to panels are still relevant to communities. A simple user interface focusing on the discussion is key. Text should be large and legible and user experience should be at the core of the strategy. Of course, this means separating the desktop experi-

ence from mobile and creating platforms that are tailored to both.

## Must pose the question

Mobile panels and communities are still in their infancy. Through these early years we have debated whether they are more effective than their desktop alternatives and have perhaps become a little obsessed. Now that the technology is in place that enables mobile research, we must pose the question of where and when is it appropriate.

Perhaps the biggest failing of mobile research is the tendency to skew towards a particular demographic. Research from Deloitte indicates that smartphone penetration is at 71 percent in developed countries for individuals ages 18-54.[3] However, in the same sample, only 37 percent of individuals over the age of 55 own a smartphone. In addition to this, there is a whole 36 percent of the population who do not own a smartphone in any form.

Income has an additional effect on smartphone penetration. Only 39 percent of individuals earning under $50,000 a year own a smartphone. In comparison, 64 percent of individuals earning over $100,000 a year own one. So when considering any form of mobile market research, sampling is always an important and pressing issue. Mobile research should be an aspect of a broader research strategy, not the sole delivery method.

This has led to the concept of device-agnostic research – panels and communities that can be completed on any Internet-enabled device without discrimination, whether that is a desktop computer, tablet or smartphone. However, this ignores the behaviors that surround each device. Mobile and desktop users interact with research in different ways and research must reflect this. We must move forward from device-agnostic research, creating innovative panels and communities that adapt to the delivery method and its associated behaviors.

This leads us to the next biggest challenge that researchers face: the tablet. Somewhere between mobile and desktop, the tablet can be used in place of either. In terms of practicality it is more similar to mobile but for many consumers it is used in place of a desktop. It occupies a unique space that is tricky to navigate for researchers. Behaviorally, it can be used as either a mobile or desktop alternative.

How market researchers will tackle this new challenge will provide insight into the future of online panels and communities. Perhaps a new tablet-oriented approach has yet to be developed. Or perhaps screening questionnaires will take into consideration both device type and usage habits. The future has yet to be decided and it is important to ensure the difference between mobile and desktop research is fully understood before tackling tablet devices. But one thing is for sure: Researchers who clearly identify device and behavior-led research strategies will generate the most accurate and reliable data. Ⓠ

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R E F E R E N C E S
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2 www.emarketer.com/article/2-billion-consumers-worldwide-smartphones-by-2016/1011694

3 www2.deloitte.com/content/dam/deloitte/global/documents/technology-media-telecom-munications/gx-tmt-2014prediction-smart-phone.pdf

••• panels and communities

# Keeping the conversation going

## What are the factors that contribute to a healthy online community?

| By Niels Schillewaert, Steven Debaere and Tom De Ruyck

snapshot

The authors explore data from a study of 10 online communities to better understand the roles that language, emotion, community size and other aspects play in fostering an effective group experience.

Despite the huge potential and popularity of online communities, many researchers still have doubts about how to successfully run them. While academic research has indicated that collaboration communities with customers accelerate innovation (Von Hippel and Katz 2002), more than half the research communities fail, as many suffer from a downturn in activity or churn (Gambetti and Graffigna 2014).

Concerns about quality are a threat to this novel form of collaboration and will only increase the uncertainty surrounding their effective use. While we know much about how to successfully run focus groups or in-depth interviews and ethnographies, we have much less knowledge about the drivers of quality and churn in online research communities. This article aims to contribute to that understanding by examining data from a study of 2,190 members in 10 communities across industries.
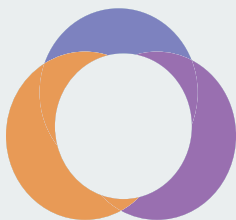
## Benefits and experiences

Members of a community or a consumer consulting board interact with each other and a moderator to share their opinions and data via posts – text, visuals as well as videos. Actively participating in a community is demanding for consumers and it often requires consumers to spend considerable time and effort in completing tasks (e.g., taking pictures, completing shopping missions, doing interviews with peers, etc.) (Schillewaert and De Ruyck 2012). While there may be an extrinsic motivation for consumers to participate (e.g., cash incentives), they will only continue to do so if the community provides benefits and experiences that are valuable and interesting. Logically, community participants are the most important asset of research communities and determine the quality of a community and subsequently any business decisions based on them.

The quality of a community can be assessed by looking at its activation levels or churn, both in terms of quantity (participation) as well as in quality (contribution of content). Depending on the amount of effort community members put into participation and contribution, they can be classified as active or passive. Churn is collectively defined as passive participation and passive contribution. Churn is a threat to structural collaboration in communities for several reasons. Passive participation and contribution will result in shallow communities, superficial findings and inferior content. Churn is omnipresent and contagious as well. Research communities are dynamic social environments. Members not only mimic each other's behavior but also use one another's contribution as a proxy for the overall quality of the environment and adapt their own communication and contribution to it. In the end, non-active members are just a waste of resources and missed opportunities. Churn hampers co-creation and community managers must understand and minimize it.

To battle churn effectively, one first needs to understand its drivers. Only then can proper actions be taken. Extensive studies have explored what drives human behavior. Psychology scholars have identified past behavior ("what we did") and environment ("where we find ourselves to be") as effective predictors of future actions. In research communities, both types of drivers can be determined by analyzing participants' posting behavior. Specifically, past behavior can be analyzed via the "recency, frequency, monetary" (RFM) framework and the environment is defined by the members who personify the community. The following sections explain why we believe these drivers are suitable potential churn predictors.

**Size of the community.** The word "community" refers to a group of people who share similar attitudes, interests or goals. For research purposes a community is mostly purposefully built and closed. A true consumer consulting board focusing on engagement and structural collaboration should therefore consist of an intimate sample of consumers interested in a specific topic. If communities are too big they become dysfunctional as wading through discussions for participants becomes cumbersome. Previous research on this topic has shown that having too large of a group of people and too many posts in a community can lead to lurking and lower activity (Schillewaert et al. 2011).

**The recency, frequency, monetary framework.** The RFM framework is a fundamental model originating from customer relationship management to identify churn behavior. The RFM model uses behavioral customer activity data over a specific time period to construct three key variables that characterize the quality of member activity.

The recency (how recently did a member post) dimension positively relates to churn. People who have recently contributed to a community feel they have done (part of) their duty and hence their predisposition for subsequent participation and the depth of an upcoming contribution may be lower. The frequency (number of posts over time) and monetary value (length of posts), on the other hand, have a negative relationship with near-future churn. This is because consumers with a high frequency of participation and contribution as well as those who made long posts in the past have made that behavior more habitual and developed a certain loyalty to the community. What also happens is that these consumers have observed similar behavior from peer participants, which they mimic. As RFM is valuable for churn identification, we believe it is very suited for community relationship management and to assess churn identification in communities.

**Positive emotionality.** Respondents are positively affected by the excitement levels of others. Enthusiasm and ambition generate positive vibes and make people work towards similar goals (Elliot and Thrash 2002). Emotions also work contagiously on the judgments and behaviors of others. In fact, Barsade (2002) found that a positive emotional state enhances cooperation between group members and improves perceptions of task performance, resulting in a constructive

### Table 1: Significance and Importance of Churn Drivers

| Variable | Passive Participation (standardized β, significance) | Passive Contribution (standardized β, significance) |
|---|---|---|
| Size | .53 (***) | .32 (***) |
| Recency | .29 (***) | .28 (***) |
| Frequency | -.87 (***) | -.20 (***) |
| Monetary Value | -.00 (n.s.) | -.41 (***) |
| Positive Emotionality | -.14 (***) | -.18 (***) |
| Swearing | -.12 (***) | -.00 (n.s.) |
| Anger | .00 (n.s.) | .12 (***) |
| Media | .32 (***) | -.14 (***) |
| Technology | -.22 (***) | .09 (***) |
| Community length | -.31 (***) | -.20 (***) |

*** < .0001; n.s.: not significant
Control variables

## Figure 1: Conceptual Churn Model



Size of the Community — +
Recency — +
Frequency — -
Monetary Value — -
Positive Emotionality — -
Swearing — +
Anger — +

**Churn**
Passive Participation
Passive Contribution
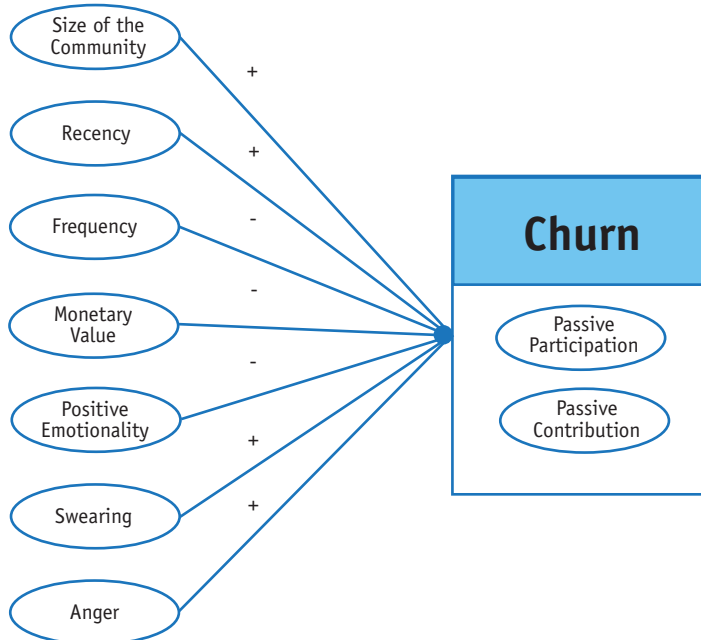
environment that creates the perfect atmosphere for community members to participate and contribute.

**Negative emotions: swearing and anger.** Negative feelings inhibit group performance and thus it is common practice to moderate and manage groups (e.g., focus groups, communi-

ties) in way that creates and promotes a positive atmosphere. Researchers always ask consumers to take a positive stance, to be critical but remain constructive. When people are angry or stressed they can become less inclusive, may feel less motivated to complete cognitively demanding tasks and ultimately disengage from the community. On the other hand, as researchers and marketers we want people to be critical and provide unfavorable feedback as well. So some form of negative expression should be allowed and may stir up the discussion. The question is, how far is too far? Can people use expressive language and swear or also rage and be angry and yet not inhibit the mood and larger goals of the community?

### Study

InSites Consulting provided a dataset of 150,943 posts of 2,190 members in 10 branded communities, organized differently from 2011 until 2014. The communities were all managed by InSites Consulting for consumer insight purposes, using similar methodologies. The communities were spread across in-

dustries (e.g., CPG, media, technology) as well as varying in terms of duration (from five to 32 months) and number of participants (from 71 to 436).

To assess churn prediction, a predictive modeling methodology was used that applies logistic regression on past data to predict a community member's churn probability.

Figure 1 depicts the conceptual model tested. The variables used in our model were operationalized as follows:

• The churn variables were determined in different ways. The participation dimension is calculated as the member's participation rate in total active community topics. The contribution dimension relies on the text-mining software Linguistic Inquiry and Word Count (LIWC) (Pennebaker 2007). Text analytics represents a powerful tool to easily operationalize churn drivers and churn variables via analyzing posting behavior. Contribution is operationalized by means of the average amount of cognitive words a participant used per post. This variable is indicative of

quality and makes a reliable measure for member contribution (Ludwig, Ruyter and Mahr 2014).

• Size of the community is, of course, the number of members active in the community.

• The RFM framework is operationalized via "the number of days since the last post of a member" for the recency variable (R), "the number of topics a member participated in" relates to frequency (F) and "the average word count members use per post" is a proxy for the monetary variable (M).

• LIWC also contains word categories (positive, negative, angry and swear words) for all the corresponding emotional dimensions of the churn drivers.

• Because the communities varied in sector as well as length we controlled for these variables in identifying churn. In fact, it can be expected that, for example, studies in media or technology are intrinsically more or less attractive than CPG/FMCG studies for consumers to participate in. Similarly, shorter or longer commu-

nities may also have a given impact on churn.

## Results and implications

Table 1 provides an overview of the importance and significance of the drivers for churn.

**Big size breeds big problems.** Smaller communities with an intimate sample of participants lead to higher levels of activation and higher-quality contributions or, collectively, less churn. When communities have more active participants, threads become crowded and consumers believe everything has been said, hence their participation and number of posts drop. Also, threads may become very text-heavy and participants do not want to read all the comments of their peers and thus may start lurking (merely browsing) or contributing with very short replies, often repeating or confirming what has already been said.

**Less recency, less frequency, shorter posts = lower-level members.** Recency and frequency of participation had the expected effect on churn as well. The less recently a member of the community has posted, the higher the chance of passive participation and contribution in the near future. When people have not been active for a long time or they feel their duty is done, they feel less urgency to actively interact with the community. The frequency and regularity with which a consumer participates in the community is also important for activity levels. Frequent participants will continue to keep their quantity of participation up but also keep contributing in a meaningful way. Monetary value or the sheer amount of words members contribute in one period does not significantly predict future participation. Quantity of words, however, does significantly lower passive contribution – people's lengthy contributions are a form of leading indicator for meaningful contributions in the subsequent phases of a community.

**Pursue positivity.** The better the tone of voice in emotional writing in the community, the lower the probability for churn in terms of both passive participation and passive contribution. This confirms that a supportive community environment encourages participation and collaboration.

**Allow cursing and avoid raging.**

The impact of using negative wording seems a little more complicated. Our results show that the use of swear words is not detrimental to the quantity of participation, well on the contrary. When the tone of voice is dominated by anger, however, we found the chance of lower-quality contributions to increase. So it seems that cursing and the use of bad language is tolerable but a delicate balance is needed to ensure communities do not become poisoned by the raging anger of some members.

## Conclusions

The fact that we can adequately identify community churn based on recency, frequency and tone of voice allows for effective and proactive community management and moderation. Our results show that an important role for the research designers and moderators of a consumer consulting board is to make sure members stay engaged. In case of churn, they can be individually targeted based on their behavior (RFM) and/or they can be subtly managed in positive ways to avoid damaging their content contribution.

Past frequency of participation is by far the best predictor for future participation. This implies that getting off to a good start is important when launching a community. Also, frequency can be used to estimate participation for upcoming tasks and used for active response management as well as additional recruitment efforts. For good contributions in the form of high-quality content, the length of a member's posts is important. Community managers should stimulate people to participate in great detail as they will build the habit of doing so as well as set examples for peers. These findings are important and confirm the need for the development of high-quality engagement techniques and moderation. Communities are not just about technology but rather about understanding humans and their social relations. The experience of participating in a consumer consulting board should be a positive (brand) touchpoint experience for consumers and not one that causes them to disengage.

Another important aspect for practitioners running communities is to delicately determine the size of the community. Overcrowded and big communities require more attention and it is worthwhile to consider having subcommunities or rooms within a bigger whole rather than one big open platform (which is more panel-like).

Finally, our findings indicate that moderators must closely monitor the community's emotional level, which can be easily done using the automatic sentiment analysis capabilities of existing text-mining software. Additionally, moderators must not act in a polarized way when it comes to emotions being expressed. Not everything with a negative connotation is necessarily bad for the community. Moderators must strive for a positive environment within the community and avoid allowing too much anger to overshadow the proceedings but can allow some cursing as long as it doesn't get out of hand. ⓞ

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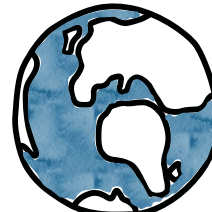
# Testing 1, 2, 3

## How effective are big data services in identifying low-incidence targets?

| By James Karr, Jim Legg and Jason Fuller

**snapshot**

The authors present three case studies in which they tested two products from a leading big data company – a predictive model and a data-append product – to determine their accuracy in identifying hard-to-reach target groups on a panel.

From a research perspective, the alluring promise of big data is its potential to deliver a wealth of household- or individual-level information far beyond what could typically be collected through traditional pre-screening and profiling techniques. Many big data companies have comprehensive demographic, financial and behavioral databases of the population that they claim can be leveraged to help identify specific target groups for subsequent research or marketing purposes. For example, core demographics such as age, income and education could be used to predict the likelihood of a person being a small business owner and those with the highest probability could then be sampled for a survey to that target, with the expectation that the incoming sample would have a higher incidence than if one had randomly sampled from a panel or other online source.

But how accurate and reliable is the information in these databases? We wanted to know whether big data could help identify low-incidence, hard-to-reach targets on our panel and do so more effectively and cost-efficiently than a standard pre-screening survey could achieve. If successful, this service could allow sample providers to more efficiently sample from proprietary panels, as well as decrease the use and cost of third-party sources. So, in the context of maximizing in-house sample, does big data add value?

To address our questions, we tested two different services from a well-known big data company across three studies.

1. A statistical model that predicted the likelihood of certain individuals having characteristics of interest that had been neither previously profiled nor were directly available in a big data database.

2. A data "enhancement" product that appended pre-existing data at the individual, household or address level to selected panelists' records, based on matching their name

quirks.com/articles/2015/20151109.aspx

Table 1

|  | Denture wearers (test and retest) | Ad service buyers |
|---|---|---|
| Sample | 35-70-year-old Ipsos U.S. panelists | 25-65-year-old Ipsos U.S. panelists |
| Target group | People who wear full, removable dentures and use a paste/cream fixative | Decision-making personnel involved in the selection of advertising media for their own or their clients' products or services |
| Estimated incidence | 1.8% | 3.0% |
| Respondents screened | 2,637 and 2,144 | 3,029 |



Figure 1: Denture Wearers Incidence Rate: Test vs. Retest
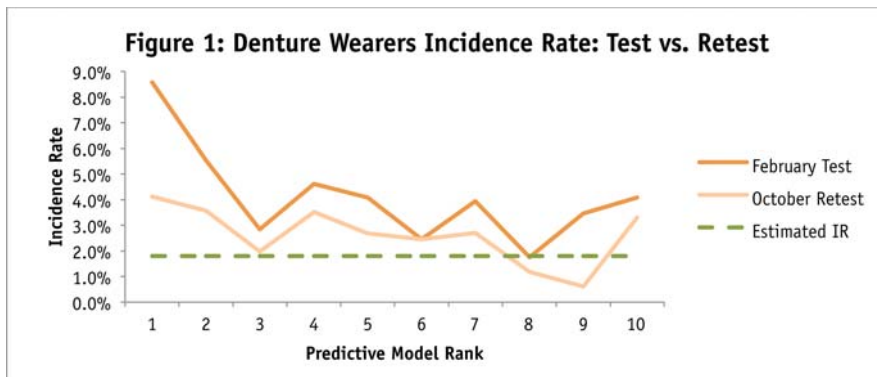
and postal address.

For both services, our key question was whether the big data product did a meaningfully better job in terms of identifying the low-incidence target group versus what we would have obtained through random sampling and screening from our panel. We have condensed the results according to which service we were testing.

**Case study 1 and 2:** Denture wearers (test/re-test) and ad service buyers
**Product tested:** Statistical model (predictive)

## Method
We delivered a name-and-address file of 122,000 U.S. panelists to a big data company, which presumably computed the probability of each panelist belonging to each target of interest (denture wearers and ad service buyers; see Table 1), and then sorted all 122,000 people into 20 equal-sized subgroups representing higher or lower likelihood of qualifying. For example, the 6,100 panelists in dentures rank group 1 were all considered "rank 1," the group with the greatest overall probability of being denture wearers, and hence qualifying for the study. The 6,100 panelists in rank group 2 were "rank 2" and had the second-highest overall prob-

ability of qualifying, and so on.

We then randomly selected a subset of panelists from each rank group in the top 10 ranks to participate in the survey. There was no overlap between respondents in the denture wearers and the ad service buyers studies, and in the denture wearers study, different panelists were selected for the test versus retest legs.

## Results
The denture wearers study was run in February 2014 and again in October to retest and validate the results. We examined the respondents in each rank group from the big data provider and compared their incidence to the estimated population incidence of denture wearers (based on online sources). Figure 1 illustrates the incidence rate for each rank compared to the population incidence.

We made two observations. First, incidence rates were noticeably higher for ranks 1 and 2 in both tests, i.e., there were more denture wearers in those two rank groups versus the remainder, which is what one would predict. Ranks 3 and lower, however, did not consistently discriminate on incidence. In several cases, respondents from a lower rank had an equal or even better chance of qualifying for and completing the survey.

Second, there was substantial variability between test and retest. Even rank 1, the best rank, had an incidence rate of 8.6 percent in the February field but only 4.1 percent in the October retest.

The big data company did not provide actual probability estimates, either for each individual panelist or for their rank subgroups, so we had no idea what magnitude of incidence we might observe. We were simply told that people in rank 1 had the "best chance" of qualifying, whatever that might be. So it was possible that our panelists might all have been higher, or lower, on incidence of denture wearers, as compared to the population incidence. But the rank groups themselves should have at least shown a progressively lower incidence rate as the ranks decreased. And, given that we pulled respondents for the test and retest legs of the study from the same group of 122,000 panelists, we would also expect the incidence of each rank group to be roughly the same both times. Neither of these patterns was observed.

The findings for the ad service buyers study were worse. Again, while we did not know ahead of time whether our panelists would generally be higher or lower than population incidence, we did expect that the highest-ranked respondents would also have the highest incidence or highest percent qualifying for the study. But, as can be seen in Figure 2, the big data ranking variable added no value to the project. Here we looked at panelists from all 20 rank groups and found no relationship between incidence rate and rank.

**Case study 3:** Automobile purchase intenders
**Product tested:** Data enhancement
**Sample design:** 25-50-year-old Ipsos U.S. panelists
**Target group:** People intending to purchase or lease a new vehicle within the next 12 months
**Total respondents screened:** 7,571

## Method
The same file of 122,000 U.S. panelists was also used as our base here. The big data company appended an "intend to purchase a vehicle" flag

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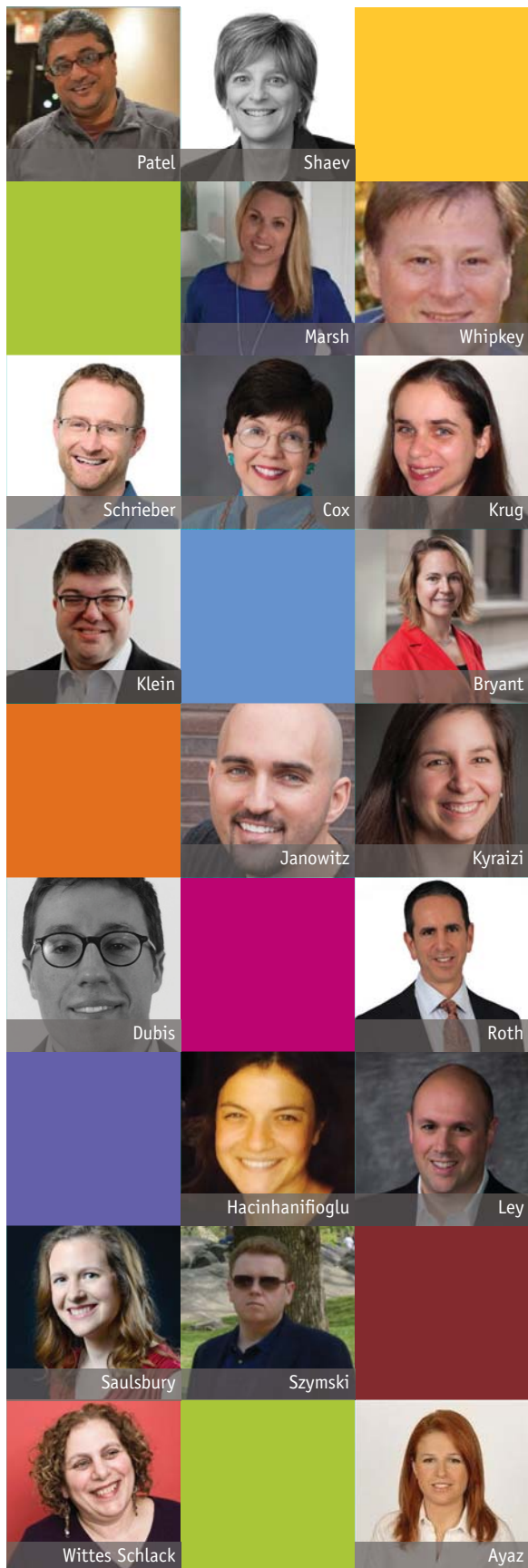
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- **Thou Shalt Be Relevant:** During no part of your presentation should you ever sell your company, services or products

- **Thou Shalt Be Honest:** Speak of failures as well as success and never exaggerate statistics, findings and claims

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- **Thou Shalt Be Prepared:** Practice, Practice, Practice! Do not read directly from your speech or from your slides

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**Figure 2: Ad Service Buyers Incidence Rate**

A line chart titled "Figure 2: Ad Service Buyers Incidence Rate" with the y-axis labeled "Incidence Rate" ranging from 0.0% to 3.5%, and the x-axis labeled "Predictive Model Rank" from 1 to 10. The "Observed IR" line (solid) fluctuates while the "Estimated IR" line (dashed) remains constant at 3.0%.

**Figure 3: Automobile Purchase Intenders Incidence Rate**

A bar chart titled "Figure 3: Automobile Purchase Intenders Incidence Rate" with the y-axis labeled "Incidence Rate" from 0% to 25%. "Data Append Panelists" shows approximately 24% and "Randomly Sampled Panelists" shows approximately 17%.

for each panelist. Panelists were given either a "yes" or blank value (if the big data company could not identify the panelist in their databases, the field was left blank). We then randomly selected panelists with this flag to take the survey and validate their eligibility; 2,173 people responded. As a comparison, we also invited a comparable random sample of panelists who were not submitted for data enhancement (i.e., not part of the 122,000); 5,398 responded.

**Results**

Figure 3 compares incidence rates between the panelists who were pre-identified as intending to purchase a vehicle and panelists who were not submitted to the big data company but simply chosen randomly from our panel. We found that the pre-identified "intend to purchase" group had an incidence rate of 24 percent, which was indeed higher than that of our random sample (17 percent).

**Performed quite differently**

The two big data products we tested – a predictive model and a data enhancement service – performed quite differently from each other.

In our tests, the predictive model performed poorly. Even the model's highest-ranked candidates varied

substantially in the percent who actually qualified for the study in question. In the dentures study, the incidence rate dropped to half its previous level on retesting, even though both test and retest legs came from the same pool of panelists who had all been ranked for their likelihood of wearing dentures. And for ad services buyers, the model was a complete failure, with no correlation between rank group and incidence.

Although we were not privy to the inner workings of the predictive model, we can imagine several potential sources of error that may have contributed to its poor performance in our tests.

**1. Low match rate.** The big data company we used was not able to identify everyone on the basis of their name and postal address. In our dentures tests, the match rate was roughly 80 percent of the panelists we sent them. For the ad services study, we had a partial match rate of 26 percent, as the big data company only returned flags for individuals whom it located in their database

AND who met the target criteria; it could not distinguish between non-target and non-matching individuals, which made it impossible to calculate an overall match rate.

**2. Data accuracy.** Even when a person of interest had been positively identified in the company's databases, the information itself may not be fresh. It is no secret that the accuracy of big data databases can be highly questionable.[1,2] This makes sense: many databases such as government or financial records might only be updated once a year; other sources include "one-shot" databases that may not change at all beyond their initial creation (e.g., registration/sign-up databases).

**3. Model correlations.** Any predictive model will naturally have some inaccuracy simply because the data do not perfectly correlate with what the model is trying to predict. For example, age and being a denture wearer are positively correlated but only to a degree; some 75-year-olds do not wear dentures, while some 55-year-olds do.

**4. Low incidence.** In our tests we were looking to identify very hard-to-reach targets whose natural population incidence was less than 5 percent. It could be that such small incidence rates are beyond the ability of a predictive model to reliably identify, i.e., the statistical power simply isn't great enough.

The data enhancement service produced better results. For the automobile purchase intenders study, a pre-existing purchase intent flag was appended to the list of panelists we submitted. Since this was self-report data (i.e., these people had themselves indicated intending to buy an automobile at some earlier point in time), not surprisingly it did a better job at identifying eligible respondents in the study versus a comparable random sample. For this product, our only wish was for greater transparency around the appended data; we did not know how old it was nor which people had been positively identified, yet had not indicated an intention to purchase.

On the basis of our testing, therefore, we see some limited upside to using big data services at the micro level. Yes, there's a lot of individual-level data available in the public domain but the challenge of matching it on a case-by-case basis to specific individuals, and the age of the data itself, may reduce its accuracy to the point where it's no longer useful. ⓠ

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# Accounting for differences

## How can we ensure cross-border research is actionable?

| By Conor Wilcock

**snapshot**

The author explores some of the factors at play when fielding global business-to-business research projects.

As market researchers, our primary goal is to ensure that the insights we provide to our clients or to internal teams are as actionable as possible, while maintaining high levels of validity. However, delivering this in global research projects is a challenge due to the variety of cultural biases at play. So how can researchers empower organizations using actionable insights, when conducting research across borders?

Charles Kettering, once head of research for GM, said that "a problem well-stated is a problem half-solved." Simply being aware of and understanding the cultural biases which exist in market research is as important as identifying ways of accounting and reducing them. Research conducted by our firm, B2B International, on cultural bias in numerical rating scales has found that a respondent's culture primarily affects the relative strength of three response styles:

- **Extreme response style (ERS).** This is the tendency to use the extreme ends of a scale (e.g., 1-4 and 9-10 on a 1-10 scale). Our research found that respondents in Latin America lean strongly to the extreme response style; Chinese respondents also exhibit extreme responses, although to a lesser extent. A strong ERS usually leads to higher aggregate scores.
- **Midpoint response style (MRS).** This is the tendency to use the middle ratings on a scale. For a 1-10 scale, this generally means 5-8. The strongest midpoint response style was produced by respondents from Southeast Asia, namely Japan, Korea and Singapore. Some Western European markets also exhibit a similar response style, such as France and Germany. A strong MRS usually leads to lower aggregate scores.
- **Acquiescence bias.** Similar to social desirability bias, this is the tendency to respond in a way which is perceived to be desirable to the interviewer or survey sponsor. Countries or regions which exhibit a strong acquiescence bias include Latin America, China and

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## Figure 1: Response Style Tendencies In Major B2B Research Markets



Figure 1: Response Style Tendencies In Major B2B Research Markets

as are the ways in which respondents approach surveys and rating scales. Understanding these trends is critical in any attempt to account for and address cultural bias in global studies.

A comparison of cultural bias studies conducted in consumer circles with our analysis of B2B research shows similar results. This makes sense, considering that every business decision maker is a consumer when they leave for work in the morning and return home in the evening. Cultural biases should – and do – circumvent the work/home threshold. However, there are key differences when examining response styles of B2B versus consumer respondents within countries.

Generally speaking, B2B respondents are less likely to provide extremely positive or negative ratings on a survey scale. This could be due to the longer-term relationships which exist in B2B markets; such tenured interactions could lead to a "smoothening" out of scaled responses, because of the expected ups and downs of such a relationship.

Our theory is supported by looking

Southeast Asia. Respondents in Australia, Singapore and France showed little to no such bias. A strong acquiescence bias generally leads to higher aggregate scores. The chart in Figure 1 summarizes high-level cultural bias in business-to-business research, in terms of typical response styles.

This analysis validates previous literature on the subject, although such studies focused exclusively on consumer markets, while the focus of our analysis was on B2B audiences. However, researchers should avoid making broad conclusions about cultural bias without first taking into account other factors which may affect response styles within and among cultures. We also must appreciate that the research world is constantly changing,

at the range of Net Promoter Scores for consumer brands versus B2B brands. Generally, the worst-performing consumer brands receive lower Net Promoter Scores than their B2B equivalents (imagine the energy company or Internet service provider that makes your blood boil). The story is the same with the best-performing brands. When conducting B2B2C studies which include consumer and business respondents within one country, researchers may anticipate more "bunched" responses among the B2B sample.

## Interesting shifts

Our analysis uncovered some interesting shifts over time. B2B survey response styles across many parts of the world are changing and our firm's research and analysis shows this happening most notably in developing markets, potentially as a result of businesses in these regions having more interaction with Western firms. Nowhere was this shift more notable than in China. Response styles among Chinese B2B respondents have become less extreme over the last three to five years and now more closely mirror the likes of the U.S. and U.K. We might expect to see a similar shift for Mexico and Brazil as they do more business with Western countries and as B2B research becomes more entrenched and less of a novelty.

Generally speaking, the more senior a respondent is, the more they will tend to exhibit a slightly stronger midpoint response style and a significantly weaker acquiescence bias. This typically leads to lower aggregate scores when compared with those in junior roles in the same country.

This distinction is more apparent in countries that typically have stricter and more linear business hierarchies. In China, for example, businesses often operate a Confucian hierarchy, where senior executives are "benevolent leaders." The drop in acquiescence bias when surveying a senior respondent is therefore greater in China than in Scandinavia or Australia, where hierarchies are more casual or even non-existent. Interestingly, it's in these countries where we see a lower inclination to agree with, or please, the interviewer or survey sponsor in general.

Researchers can reduce confusion and to a certain extent cultural bias by anchoring numerical scales, to ensure clear and objective definitions are communicated to respondents of all nationalities. In a satisfaction survey, this generally means "1 – not at all satisfied" and "10 – completely (or extremely) satisfied." Without anchoring, researchers put themselves at the whim of respondent subjectivity: a score of 7 out of 10 will be interpreted very differently in Japan versus in Brazil.

Anchoring also avoids respondent confusion as to which end of the scale is positive and which is negative. In German schools for example, outstanding students are given a score of 1. Therefore, many Germans enter adulthood with the subconscious perception that 1 equals the best score possible. We certainly would not recommend flipping a rating scale for German respondents only in a multi-country survey; rather, clear anchoring should serve to eliminate inaccurate grading.

Generally, native-language interviews result in more extreme responses, while non-native language interviewing (e.g., using English in Scandinavia) result in more mid-point responses. For example, a survey conducted with Norwegian respondents in English will likely lead to lower aggregate scores than if the surveys were administered in Norwegian. This may be because they feel more confident responding in their native tongue and therefore more likely to answer assertively.

Rather than adopting English as the default language for global surveys, researchers should seek to administer them in native languages. While this won't eliminate cultural bias, it will lessen the negative skew in the data caused by strong mid-point responses.

There may be temptation for researchers to attempt to eliminate cultural bias from research datasets by applying weighted algorithms, the intention being to standardize the results. For example, researchers could utilize an algorithm based on typical response styles which may shift a company's Net Promoter Score (NPS) up or down according to each different country in which it operates.

Arbitrary formulations of this nature can be damaging to research and subsequent action plans, as they are determinist and reductionist. Increasing Japan's NPS by 35 points and reducing Mexico's by 20 – to use a basic example – throws aside the possibility that other factors (biases as well as the company's actual performance) may be at play. It's incredibly difficult to quantify the effect of one bias and impossible to quantify the cumulative effects of all biases in a survey. Therefore, ensuring sampling consistency is the only way to account for and to control cultural bias over time.

## Benchmark and track metrics

When conducting tracking research, it's important for researchers to distinguish between "real" change (in market needs, perceptions, brand performance) rather than change due to sampling differences – for example, a higher proportion of Korean respondents from wave to wave. By ensuring sampling consistency – at the front end by setting quotas or at the back end by establishing weighting criteria to a dataset and applying the same weighting criteria to future survey waves – researchers can benchmark and track global metrics for which the cultural biases at play are consistent.

What's critical for researchers to understand is that cultural bias is almost impossible to eliminate. Instead, the focus should be on understanding and accounting for it. We don't need to remove the elephant in the room; we just need to know that it's there.

With companies increasingly using cross-border research to inform global decision-making, it's never been more important for researchers not only to understand and account for all the biases at play but to put the right methods in place to control the impact they have on research findings. Q

Conor Wilcock is research director in the New York office of research firm B2B International. He can be reached at conorw@b2binternational.com.

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# A healthy discussion

## Two-phase research approach got oncologists talking about a controversial idea

| By Lynn Welsh and Amanda Lipski
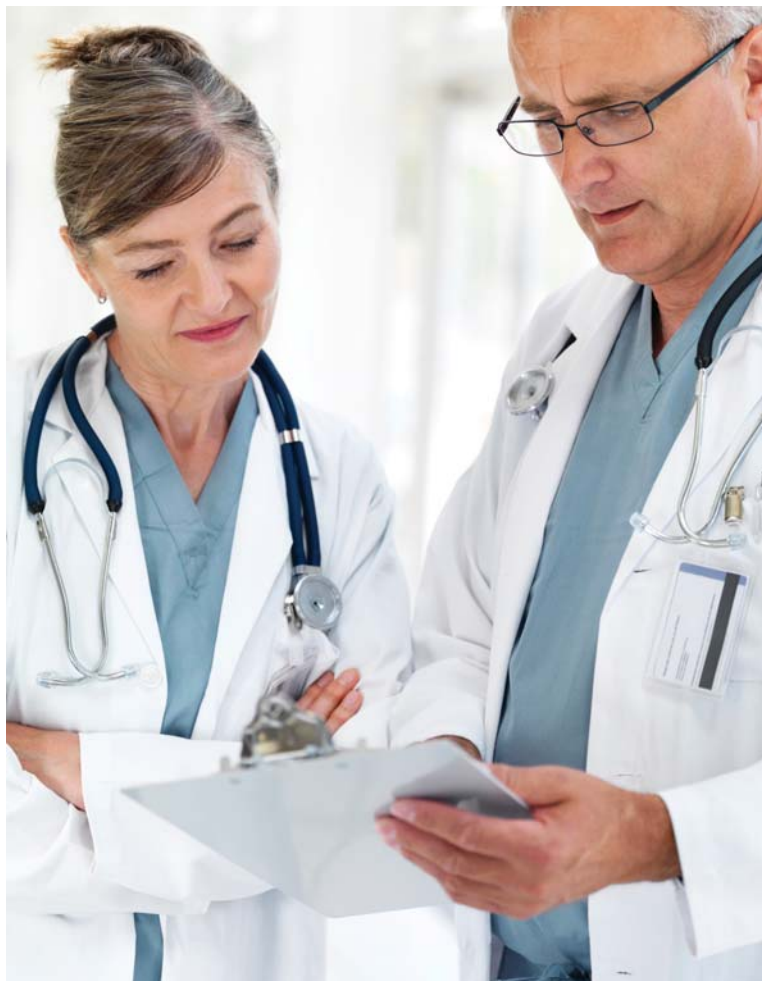
### snapshot

Researchers used a quant-before-qual approach to uncover oncologists' perceptions of a health insurer's incentive program.

The U.S. health care system is expected to spend more than $150 billion treating cancer by the year 2020. Compounding this, of the 20 orphan drugs expected to reach blockbuster status by 2018 (+$1 billion in sales), 13 are oncologic agents. It is not surprising that the increased number and cost of new oncology therapies has translated into a greater prevalence of marketing research conducted across the broad spectrum of oncology therapies in the past few years. At our firm, Olson Research, we see this evidenced in the sheer number of projects we have undertaken in this therapy area: in the last 18 months alone we have fielded over 300 research studies in oncology. The focus of this article is one such study, which was designed to uncover oncologists' perceptions of a new incentive program introduced by health insurer WellPoint Inc.

### Signaled a shift

The last several years have signaled a shift in how payer organizations are attempting to control the escalating costs associated with treating cancer. A significant rise in both the number and cost of targeted therapies has led payers to initiate programs that encourage oncologists to adhere to standardized treatment guidelines. The trend has been to incent oncologists who comply with the treatment protocols established by payers for various cancers.

In July 2014, WellPoint – which changed its name to Anthem Inc. in December 2014 – began offering oncologists a monetary incentive for each patient who receives treatment for breast, colorectal and lung cancer, as specified by one of the insurer's recommended regimens. Oncologists would receive a one-time $350 payment at the onset of treatment planning and care coordination. The practice would also receive $350 per month per patient while the patient was active in therapy and on one of the recommended pathways. This approach by payers to more greatly influence oncologist prescribing choices by incentivizing physicians to choose certain treatment approaches had the potential to be a very polarizing and provocative subject in the oncology community.

Beyond the cost savings it may afford payers, standardizing treatment pathways has the

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**Table 1: Research Approach**

| | Type | Time Commitment | Sample | Objective |
|---|---|---|---|---|
| Phase 1 | Online quant w/ qualitative elements | 8-10 minutes | U.S. oncologists | • Present WP press release and WSJ article to frame topic<br>• Opportunity to read and respond to primary sources of info<br>• Collect physician reactions to initiative<br>• Measure perceived impact on their practice, specifically treating patients and prescribing habits |
| Phase 2 | Qualitative: online forum discussion | Fielding open for 10 days, unlimited access | Consenting subset of Phase 1 respondents | • Dive deeper into topic, exposing uncovered differences in perceived pros/cons<br>• Forum to give structure to an anonymous conversation among docs<br>• Respondents read, react, respond to views among peers<br>• Opportunity for multiple visits, new comments, add to existing conversations |

potential to create efficiencies in patient care. Yet, we are living in a time of great improvements in targeted cancer therapies and these are expanding the boundaries of individualized approaches to treatment. How would WellPoint's incentive program affect physicians' and patients' desire for personalized treatment approaches? How, if at all, would WellPoint's standardized treatment pathways integrate new, innovative advances in medicine? WellPoint's program raised a multitude of issues, including the question of who should be determining treatment: payers or physicians?

### Determine the best methodology

We first had to determine the best methodology to evaluate perceptions of such a highly provocative issue. To start, we wanted to measure awareness and understanding among oncologists of the WellPoint program and to gauge their reaction upon reviewing primary source information on the program and its intentions. For this, we needed quantitative measurement. As outlined in Table 1, we elected to field an eight-to-10-minute online quantitative survey with U.S. oncologists to measure awareness of the program and gather opinions on how the program might affect their practice and prescribing habits. From within the survey, physicians were asked to review two primary sources on the WellPoint program: the WellPoint press release announcing the implementation of the Care Cancer Quality Program and a *Wall Street Journal* article ("Insurers push to rein in spending on cancer care," May 27, 2014) describing the initiative.

Beyond measuring awareness and knowledge, as the topic was explored further, we were aware that the debate surrounding the implications of the WellPoint program would elicit differing opinions. We also knew that opinions could be highly personal and rooted in larger issues of physician reimburse-

ment and prescribing autonomy. We felt that the perceived effects of WellPoint's program could be most fully explored by generating interaction between oncologists and we predicted that discussions may become somewhat charged.

In a face-to-face setting, we knew that there was the very real possibility of a physician pecking order emerging, where veteran, more experienced physicians, or perhaps those designated as key opinion leaders in their particular field of oncology practice, might heavily influence the tone and direction of a live conversation. More practically, physicians are also busy professionals for which in-person research participation is not often feasible. For these reasons, we felt an online forum discussion would be most appropriate.

At the conclusion of the survey, respondents were asked to consent to a further online discussion forum a few days later to more deeply explore the effect of the WellPoint program on both physician practices and patient care. The online discussion forum allowed us to capitalize on the richness of the comments from the qualitative elements in our survey. We took the prevailing arguments uncovered in the first research phase, those both for and against incentive programs such as WellPoint's, and turned them into discussion topics for the online forum.

### Engaged and interested

The first phase of the research project was fielded in two weeks. Responses were on-point and thorough; physicians were engaged and interested in the topic. Oncologists spent an average of eight minutes on the survey. The hybrid quant/qual approach of the survey successfully allowed us to measure awareness and understanding of the WellPoint program, while at the same time posing quite a few open-ended questions, allowing us to fully ascertain reactions to the WellPoint program.

Despite the strong opinions voiced by the oncologists who participated in our survey, only 32 percent indicated that the incentive program might change or alter their behavior. Many suggested that they were likely to adhere to the treatment pathways recommended in the future. See Figure 1 for detailed comments directly from our research.

Those in favor of the program expressed optimism that the program would dissuade unnecessary excessive treatments and also help to give oncolo-

gists some much-needed guidelines or boundaries within which to care for their patients. Some also opined that personalized medicine can offer patients false hope and that it is better to set expectations based on what medically-proven therapies can deliver.

It was evident that the forum approach was the right methodology to use for this population. Participation was frequent and regular, comments thoughtful, discussions lively, and a few heated debates ensued. (See Figure 2.)

### Deliver a robust outcome

Three underlying factors contributed to the success of this research. First, having a recognized and trusted relationship with your target market facilitates strong participation. Second, while not always under our control, timely topics or subject matter can assist in fielding success. Lastly, and perhaps most important, spending time at the project outset to ensure your methodology is most appropriate for the research need can deliver a robust outcome.

Figure 1 — Here's what Oncologists had to say:

How will this program impact **Physicians?**

"A program that is well needed in the U.S. to hopefully coordinate the care and treatment of cancer, while addressing expenditure related issues."

"This has been a trend long coming. Many practices have pathways already in anticipation. This could work if done intelligently."

"Favorable, I agree the system is broken and not sustainable. We need to have cost effective guidelines."

"I think that this is the future. We as oncologists may not be happy but this is necessary to manage health care costs."

"Insurance companies restricting the treatments is potentially dangerous. These restrictions should come from MDs and our guidelines such as NCCN guidelines."

"There is often conflicting data and guidelines that should not be written by the payors. This may actually drive quality of care down and not up."

"I am concerned it will be somewhat restrictive for newer, less proven agents."

"I'm concerned about losing my freedom to best treat my patients as individuals."

How will this program impact **Patients?**

"Excellent initiative to ensure delivery of evidence based medicine targeting patients and incentivize physicians. This should bring in homogeneity on care and help rein in unnecessary spending. A program that should have been launched earlier."

"Patients will be treated by guidelines and not over-treated by physicians."

"Provides more consistency in treatment using evidence-based regimens, improving overall quality."

"It is interesting but unfair to the patient, as it tries to make all patients the same without taking into account clinical judgment."

"There is a reason many patients do not fall into pre-determined pathways - each patient is unique."

"Apprehensive about the outcome - At the end of the day it is important that we are all here to help the patient. All these rules and regulations may affect patient outcome."

"This is going to make it very difficult to practice individualized medicine. No patient fits into a 'mold' of cancer care."

42% positive / 18% neutral / 30% negative

Figure 2: Sample Comments from Online Discussion Forum

| |
|---|
| Topic 1: Programs such as WellPoint's Cancer Care Quality Program will help standardize care, drive down costs and ensure patients are following the best treatment pathways. |
| "Far too many oncologists over the years have treated patients excessively (fourth or fifth line for advanced NSCLC), or with regimens that have no proven efficacy. I have certainly extrapolated from other studies to justify a creative treatment regimen in the past. However, as a system and as a country, we cannot afford to give treatments that have not been demonstrated, in appropriate peer-reviewed trials, to have a reasonable chance of benefiting the patient. To think that I, or any oncologist, know best, and can simply ignore the published data, is arrogance. To expect others to pay for non-proven therapies is insanity." |
| "If a physician is 'incented' to prescribe a certain way, isn't that unethical? We were just told, via Congress and the Sunshine Act, that pharmaceutical companies try too hard to 'incent' us to prescribe their drugs, via pens, notepads and meals ... in what way is it more appropriate for an insurer to 'incent' us to prescribe a certain way, with the primary goal to save them money? Sure, you might argue it is to 'improve' care, but pharma can say the same thing, as the biggest push of a pharma detail has always been to encourage 'on-label' prescribing ... which is 'good care' ... Why is it encouraged for insurers to do what pharma is discouraged from doing??" |

We recognize that a quantitative-first, qualitative-second approach is not the customary sequence to marketing research and that there are sound methodological reasons for pursuing a more traditional trajectory in most cases. However, the success of this project supports the basic premise that researchers should employ the methodology and tactics that will best deliver results. Making a sound decision to align the research methodology with your target population, time frame and subject matter can ensure successful data collection – a vital element for delivering sound results to clients. ⓪

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# Names of Note

■ Researcher and political pollster **Sidney Hollander Jr.** died on Aug. 24 at age 100. He founded *Sidney Hollander Associates* in 1949, which now continues as marketing research firm *Hollander, Cohen and McBride* in Baltimore. He was also a past president of the Association of Public Opinion Research and co-authored a 1964 university textbook titled *Marketing Research*.

■ **Chris Cage** (Christian Caggiano), MRA member and president of *Indiana Research Service Inc.*, Fort Wayne, Ind., died on Sept. 1 at age 67.

■ **Andrew Kohut**, founding director and president of the *Pew Research Center*, died on Sept. 8 in Baltimore at the age of 73. Kohut also previously served as president of the *Gallup Organization*, founded *Princeton Survey Research Associates* and was the founding director of surveys for the *Times Mirror Center*.

■ Mumbai-based research firm *MRSS India* has tapped **Archana Pai** as vice president custom research (south). **Manasi Mody** has joined as the senior field operations manager and **Pratyush Upadhyay** has been hired as a research manager. In addition, the firm has named **Rajesh Kumar** as transportation and logistics practice guru; **Chandramouli Guin** as the head of public sector practice and **Manish Ganvir** as vice president of insight sciences. In addition, parent company Majestic Research has added **Anita Phatak** as manager.

■ Tucson, Ariz., advertising research firm *Communicus Inc.* has appointed **Kathleen Coll** as senior account director.

Coll

■ Evanston, Ill., digital marketing agency *Leapfrog* has named **Scot Wheeler** vice president, consumer intelligence and business analytics, a new position within the agency's Consumer Journey practice.

■ Research firm *Mozaic Group* has appointed **Amber Reilly** as research director.

■ Cincinnati marketing attribution and optimization company *ThinkVine* has hired **Matt Nitzberg** as chief growth officer.

■ Lynbrook, N.Y., research firm *OSC World* has appointed **David Lustig** as vice president of business development – market research. He will be based out of Coral Springs, Fla.

Lustig

■ *Cambiar LLC*, a Fountain Hills, Ariz.-based management consulting firm for the market research and analytics industry, has reappointed **Beth Rounds** as a partner in the firm. She was previously a partner in Cambiar from 2009 to 2013.

■ Toronto-based agency *Bond Brand Loyalty* has appointed **Mike McDowell** as the North American vice president of business development.

■ Costa Mesa, Calif., firm *MFour Mobile Research* has appointed **Brian Landini** as a staff accountant.

■ London-based research agency *BDRC Continental* has appointed **Karen Small** as client services manager for its hotels and hospitality research team.

■ U.K.-based research company *Ipsos MORI* has appointed **Jim Needell** as managing director of marketing.

■ Culver City, Calif., research consultancy *Kelton Global* has appointed **Amy Snow** as vice president of qualitative research.

Snow

■ *ABC Family*, Burbank, Calif., has appointed **Karissa Zigarovich** as director of consumer insights.

■ Honeoye Falls, N.Y., research and consulting firm *KJT Group* has appointed **Danielle Zammit** as vice president of global access. She is located in Switzerland and will work with the firm's European practice.

■ New York research agency *Millward Brown* has appointed **Matt Glace** as global chief information officer.

■ Atlanta social marketing company *Insightpool* has appointed **Chris Hackney** as COO.

■ Bellevue, Wash., contract management software provider *Icertis* has appointed **Marc Chouaniere** as vice president of marketing.

■ Costa Mesa, Calif., firm *MFour Mobile Research* has hired **Kevin**

**Yonzon** as project manager and added **Andreas Hoelting** to its project management team.

■ **Peter Cornelius** has been appointed director of client services – media for *Ebiquity Australia* and New Zealand, part of the London-based marketing analytics firm Ebiquity.

■ San Jose retail analytics firm *RetailNext* has appointed **Kindra Tatarsky** as head of corporate development.

■ Los Angeles-based online media publisher *Evolve Media* has appointed **Jennifer Catto** as senior vice president of integrated marketing. She will be based out of the company's New York office.

■ Riverside, Calif.-based restaurant chain *Farmer Boys* has appointed **Larry Rusinko** as its new CMO.

■ **Karen Sage**, the CMO of Morrisville, N.C., spend management solutions firm *SciQuest*, has been named president of the Raleigh/Durham Chapter of the *CMO Club*, a New York-based community of senior marketing executives.

■ Radnor, Pa., visual analytics firm *Qlik* has appointed **Les Bonney** as chief strategy officer and **Mark Thurmond** as executive vice president of worldwide sales and services.

■ Cincinnati firm *Directions Research* has announced four new owners, three promotions and three new hires. **Betsy Sutherland**, **Hannah Peters**, **Miguel Martinez-Baco** and **Tiffany Bailey** are new owners of the firm. **Hannah Peters** has been promoted to account executive; **KaRene Smith** has been promoted to vice president, director marketing and design; and **Mark Erwin** has been promoted to vice president of client services. **Eric Holmes** has been hired as a research analyst, **Emily Wildhaber** has been hired as an HR/compliance coordinator and **Jeff Hunter** has been hired as the vice president of client services, health care division.

■ U.K. firm *eDigitalResearch* has appointed the following: **Angie Coombe** as re-

search manager; **David Jeans** as senior research manager; **Darryl Sherborne** as project manager; **Josh Martin** as junior developer; **Kathryn Littleboy** as graduate research executive; **Kim Seddon** as HR assistant and **Andrea Weaver** as administration executive. The firm also promoted **Craig Bright** and **Wangjia Sun** to product and innovation roles.

■ London-based emotion recognition company *Realeyes* has appointed **Jeff Ryan** as chief data scientist.

■ Naples, Fla., golf operator *Marriott Golf* has named **Brett Stark** as senior director of marketing and e-commerce.

■ Oslo, Norway, data collection provider *Norstat Norway* has appointed **Nina Kulas** as managing director.

Kulas

■ *ICrossing* U.K., part of New York-based digital marketing agency iCrossing, has named **Mark Iremonger** as the new CEO.

■ Cambridge, Mass., sales analytics company *InsightSquared* has appointed **Joe Chernov** as vice president of marketing.

■ *The NPD Group*, a Port Washington, N.Y., research firm, has hired **Lori Gerber** as senior vice president of sales for North America.

■ London-based media agency *Carat Global* has appointed **James Harris** as chief digital officer.

■ *The University of Nebraska* athletic department has named **Tucker Zeleny** as the director of sports analytics and data analytics.

■ Plymouth, Wis., firm *Sargento Foods* has named **Gerald Cox** as consumer insights manager.

■ San Francisco market intelligence solutions firm *Ask Your Target Market* has appointed **JD Deitch** as its COO.

■ Lombard, Ill., retail marketing services company the *Carlson Group* has appointed **Abigail Craigen** as account director.

■ Africa-based telecommunications company *Airtel Ghana* has appointed **Rosy Fynn** as marketing director.

■ Minneapolis-based product lifecycle company *Logic PD* has promoted **Jason Voiovich** to chief customer officer.

■ Atlanta marketing agency *Moxie* has appointed **Kristina Jonathan** as executive vice president of strategy.

■ *Ogilvy Public Relations*, New York, has

named **Kerry Sette** executive vice president/research director of the Research Group.

■ India-based market research firm *IMRB International* has appointed **K Ramkrishnan** as general manager of IMRB Kantar World Panel business.

■ Belgium-based research firm *InSites Consulting* has added **Tom Goderis** to its group of managing partners.

■ **Hilary Ranucci** has joined Baldwinsville, N.Y., firm *Research and Marketing Strategies Inc.* as its business development coordinator.

Ranucci

■ Mt. Pleasant, S.C., online sample and research operations company *Market Cube* has appointed **Alex Leger** as vice president of product.

■ London-based research agency *Future Thinking* has appointed **Dan Young** as research director and the new head of Quantum Lab, the firm's in-house think-tank for idea and product generation.

■ **Debbie Liscinsky** has joined Norwalk, Conn., firm *RTi Research* as senior vice president.

■ *Socialbakers*, a social media analytics firm based in Prague, has named **Robert Lang** as its new CEO.

■ **Seth Solomons** is returning to New York-based ad company *Wunderman* as the CEO of North America. **Jamie Gutfreund** has been named global CMO.

■ Somerville, Mass., television sell-side advertising platform *clypd* has hired **Pete Doe** as chief research officer.

■ *RightEye*, a Bethesda, Md., health technology company, has appointed **Barbara Barclay** as president.

■ **Belia Jimenez** has been appointed vice president of corporate research at New York media company *Univision Communications Inc.*

■ **Meg Whitman**, CEO of Palo Alto, Calif., information technology company *HP*, has joined the board of directors of Palo Alto, Calif., on-line survey development company *SurveyMonkey*.

■ Sweden-based firm *Red Carpet Research* has appointed **Gary Stocks** as senior vice president.

■ *The National Association of Television Program Executives*, Los Angeles, has appointed **Matt Palmer** as its new CMO.

■ *The United Kingdom Online Measurement Company*, London, has appointed **Ian Dowds** as its first CEO.

■ U.K.-based health care research consultancy *Adelphi Research U.K.* has appointed the following: **Amanda Heselwood** as associate director; **RJ Lally** and **Helen Service** as senior research executives and **Deana Scott** and **Christian Atkinson** as research executives.

■ Alpharetta, Ga., sample provider *P2Sample* has appointed **Nelson Davis** as director of client development and engagement.

Davis

■ New York research and brand strategy firm *Open Mind Strategy* has appointed **Kate Pershing** as a brand researcher and strategist and **Ruth McCormack** as an executive assistant.

■ **Anthony Ciani** has joined *Russell Research*, East Rutherford, N.J., as client services director.

■ *IDC Health Insights*, part of Framingham, Mass., market intelligence firm IDC, has appointed **Jeff Rivkin** to research director of its Healthcare Payer IT Strategies research service.

■ Boca Raton, Fla., mobile marketing firm *3Cinteractive* has hired **Kathleen Bowersox** as senior director of talent management.

■ Dallas organization *Susan G. Komen* has appointed **Charlotte (Carrie) Walsh** as senior vice president of marketing.

■ *Harte Hanks*, a San Antonio-based marketing services agency, has appointed **Karen Puckett** as president and CEO.

■ **Phil Thorpe** has joined U.K. field-work management firm *FieldBox* as managing director, a newly created role.

■ London strategic insight consultancy *Firefish* has hired **Steve Banks** as qualitative director.

Banks

■ Albuquerque, N.M., research firm *Ameritest* has hired **Margaret DiSantis** as strategic insights director, a new position. She will be based in the firm's Chicago office.

■ Richmond, Va., media company *Media General* has appointed **Lucy Hughes** as head of research.

■ London telecommunications firm *BT* has appointed **Dan Ramsay** as consumer marketing director.

■ *Olson Zaltman*, a research-based consulting firm based in Pittsburgh, has hired **Randy Adis** as a director. The firm has also formed a board of advisors consisting of: **Joseph Plummer**, adjunct professor at the Columbia Business School and former executive vice president at McCann Worldgroup; **Wendy Larson**, senior advisor at Alvarez and Marsal, former head of customer experience for MUFG Union Bank, and former head of client insights and loyalty for Charles Schwab; **Jim Figura**, founder of JSF Partners and former vice president, global consumer insights for the Colgate-Palmolive Company; and **John Willard**, former director of market research and consumer relations at Bayer Consumer Care.

■ **Kimberly White** has joined Westlake Village, Calif., researcher *J.D. Power* as an account director in the diversified practice.

■ *The Disney/ABC Television Group*, Burbank, Calif., has hired **Cindy Davis** as executive vice president of consumer experience and **John Frelinghuysen** as executive vice president of digital media, strategy and business development.

■ Cincinnati firm *MarketVision* Research has appointed the following: **Stephanie Wells** as a research associate for the qualitative field services team; **Courtney Laughman** as a research associate for the quantitative pharmaceutical client services team; **Sara Kitchen** as a research associate for the graphic design team; **Rebecca Casbeer** as a senior research associate for the quantitative client service team and **Janice Gennaria** and **Carl Murphy** as research associates for the market research online communities team.

■ New York-based content discovery platform *Outbrain* has hired **Eric Hadley** as global head of marketing solutions, a newly created position.

■ Boston start-up accelerator *MassChallenge* has appointed **Diane Perlman** as its new global CMO. She will be based in London.

■ Niwot, Colo., shoe manufacturer *Crocs* has promoted **Terence Reilly** to senior vice president and CMO.

■ *SMG Insight*, the sports and spon-sorship arm of U.K. research agency YouGov, has appointed the following: **Richard Brinkman** as director of strategy and growth; **Tracy Schoenadel** as senior vice president of North America and **Joseph Eapen** as senior vice president of India.

■ Columbia, Md., performance marketing agency *Merkle* has appointed two to its retail and consumer goods practice: **Mark Guenther** and **Alex Kooluris** as vice president.

■ Cincinnati-based retailer *Kroger Co.* has appointed **Chris Hjelm** as executive vice president and CIO.

■ Fairfield, Conn.-based *General Electric* has named **Linda Boff** as its CMO.

■ Chicago-based hiring management software provider *Hireology* has appointed **Joe Stanhope** as its CMO.

■ *Jackson Adept Research*, Los Angeles, has named **Angela Lorinchak** as president.

■ **Jennifer Storms** has been named the CMO of *NBC Sports Group*, Stamford, Conn.

■ Los Angeles market research firm *Screen Engine/ASI* has appointed the following: **Christina Parish** as senior vice president of client services for television; **Sylvia Ortiz-Moscato** as vice president of research solutions; and **Laura Zilli** as vice president of research strategies.

■ Effective Jan. 1, 2016, **Debbie Pruent** will retire from Nuremberg, Germany, research firm *GfK* and will be replaced by **David Krajicek** as chief commercial officer for the consumer experiences sector. Additionally, **Alessandra Cama** will take over the new role of chief operations officer.

■ Kirkland, Wash., big data technology company *INRIX* has appointed **Chris Handley** as vice president of product management and analytics.

■ Market research firm *Mozaic Group* has appointed **Carolyn Ahlstrom** as senior vice president.

■ France-based communications and marketing firm *Havas Media Group* has appointed **Sharon Browne** as its CMO.

■ *Discovery Communications*, Silver Spring, Md., has named **Paul Guyardo** as chief commercial officer, a newly created position.

■ Great Falls, Va., research firm *Rockbridge Associates* has appointed **Timothy Keiningham** as its chief strategy and client officer.

■ *Ipsos*, Paris, has named **Nagisa Manabe** as global president of the path to purchase and shopper service line, a newly created role. She will be based in the U.S.

■ **Paul Allen** of Yardley, Pa.-based firm *Olson Research Group* has been appointed vice president of the Pharmaceutical Marketing Research Group for 2016.

■ **Dave Gaston** has been named vice president of sales for *Branded Research Inc.*, a research firm based in San Diego.

# Research Industry News

## News Notes

■ Following a complaint to the **Market Research Society** (MRS) made by the Welsh government, the MRS found that a question in a health poll conducted by U.K.-based polling company ICM for BBC Wales breached the MRS code of conduct. The MRS said the wording of a question led participants to a certain viewpoint. The poll question was: "In England, NHS money is ring-fenced for the Cancer Drugs Fund. In Wales, funding for cancer drugs is treated in the same way as funding drugs for all other illnesses. Do you believe money for cancer should be protected?"

■ **The Advertising Standards Authority of Ireland** (ASAI) has issued a new Code of Standards for Advertising and Marketing Communications, which goes into effect in March 2016. The ASAI widened the Code's definition of "gender" after recent complaints regarding transgender issues in advertisements. Other changes to the Code include new rules on e-cigarette advertising, gambling advertising, food advertising, children's advertising, health and beauty products and environmental claims.

■ Representatives of quality-standards organization **ISO** from up to 18 countries met in Toronto on Oct. 7-9 to propose a draft of the ISO 19731 quality standard for digital analytics and Web analyses in market, opinion and social research. These standards focus on procedures and practices for newer digital areas within marketing research such as Web tracking, social media listening, metered panels, tag-based measurement and other similar methodologies. The team has been working on this specific set of standards since 2014 in order to reflect the evolving nature of marketing research beyond traditional qualitative and quantitative research. The meeting also included a discussion of the existing standards, including ISO 20252 and ISO 26362, in order to identify areas that may need updates, expansions or connections. The three-day meeting was supported by MRIA, ESOMAR, Environics, Research Now and TNS.

## Acquisitions/Transactions

■ **Verint Systems**, Melville, N.Y., has acquired software firm **Telligent** to extend its customer engagement optimization portfolio with the addition of an enterprise-class community solution.

■ South Korea-based **Yello Digital Marketing Group** has acquired a majority stake in **Computerlogy**, a social media analytics firm based in Bangkok.

■ **Oracle**, Redwood Shores, Calif., has acquired **Maxymiser**, a New York cloud-based software provider that enables marketers to test, target and personalize what a customer sees on a Web page or mobile app.

■ Chicago gift card marketplace **Raise** has acquired **Tastebud Technologies**, a Chicago-based predictive technologies developer that creates customized mobile shopping experiences based on a user's style sensibilities.

■ Seattle social media analytics firm **Simply Measured** has acquired **Inside Social**, a marketing analytics company also based in Seattle.

■ Oakbrook Terrace, Ill., B2B media and information company **Winsight** has acquired **Technomic**, a Chicago-based research and consulting firm for the food and food-service industry. Technomic will continue to operate under its brand name and will serve as Winsight's information and advisory services platform.

■ Atlanta-based consumer research and data collection firm **Jackson Associates Research Inc.** has merged with **Adept Consumer Testing**, a facility with offices in Beverly Hills and Encino, Calif. The new California division of the company will be named Jackson Adept Research. The company will be headquartered in Atlanta where its facilities will continue to operate as Jackson Associates Research Inc.

■ Portland, Ore., TV and movie measurement firm **Rentrak** has acquired New York-based big data platform **SponsorHub**. Through the acquisition, Rentrak will offer products that measure the effects of social media on television, dynamic ad insertion, online video advertising, movies and branded content integration.

■ Stamford, Conn., researcher **Gartner** has acquired **Capterra**, a business software provider based in Arlington, Va. Terms of the deal were not disclosed.

## Alliances/Strategic Partnerships

■ New York health care consulting firm **Kantar Health** has partnered with Israel-based technology company **Data2Life** to provide early signal intelligence on drug side effects based on real-world information to the pharmaceuticals industry.

■ Mumbai, India, managed analytics firm **Ugam** is partnering with **OnePoint Global**, a mobile and online survey technology solutions firm based in the U.K. The partnership will enhance Ugam's mobile and SMS-based

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survey capabilities and allow Ugam to set up mobile surveys on any device to collect responses online or offline using OnePoint Global's survey technology, allowing clients to capture customer feedback in real-time.

■ Budapest, Hungary, social media analysis firm **Bakamo.Social** and **Nepa U.K.**, part of Stockholm-based research, consulting and IT firm Nepa, have entered a strategic partnership that adds Bakamo.Social's insight to Nepa's ActionHub platform to provide clients with a better understanding of consumer behavior.

■ Chicago-based market intelligence and insights firm **IRI Worldwide** has formed an alliance with **Gigwalk**, a San Francisco-based distributed workforce management platform, to combine the IRI Liquid Data platform – a data management tool that offers predictive analytics and insights on a mobile technology platform – with insights from Gigwalk's Mobile Crowdsourcing solution to form data sets CPG brands can use to support retail strategy and in-store execution efforts. It also gives consumers a view into retail operations to ensure initiatives at the store level are being executed correctly and delivering maximum ROI for business.

■ U.K. customer science company **dunnhumby** has set up a joint venture with Chinese supermarket chain **China Resources Vanguard**, giving dunnhumby data from all Vanguard shoppers and 20 million loyalty card users.

■ A new partnership between Netherlands-based data collection software firm **Nebu** and Australia-based **Tremayne Consulting Group** will add Tremayne as a Nebu reseller in the Australasian region.

■ Tokyo-based **GMO Research** has expanded its panel reach in China by forming a strategic capital and business alliance with **Ignite Vision Holdings**, a subsidiary of China-based Internet research and advertising agency Ignite Vision. Through the alliance, GMO Research has acquired rights to market Ignite Vision's panel for survey purposes. Ignite Vision's panel will integrate into GMO Research's China Cloud Panel platform in October and concentrate its business scope on promotion and GMO Research will take over survey panel management through the DIY research system Market Observer.

■ Wellington, New Zealand, mobile data collection software company **Harvest Your Data** has partnered with the **United Nations Relief and Works Agency for Palestine Refugees in the Near East** (UNRWA), a relief and human development agency based in the Middle East. Harvest Your Data has developed a survey data collection app that is able to conduct poverty assessment surveys with over 1 million Palestinian refugees. Using this app, UNRWA preloads home visit "baseline" data that has been collected in prior months onto social workers' tablet devices. During the social workers' home visit, they can update historical data and collect new poverty assessment data.

■ **GfK**, Nuremberg, Germany, and Germany-based vehicle researcher **Deutsche Automobil Treuhand** GmbH are cooperating in the field of vehicle data, aiming to create new products for end consumers and various stakeholders in the automotive industry. The cooperation will allow the two companies to offer vehicle data over the entire life cycle of a vehicle, with data consisting of vehicle information prior to market introduction, data regarding configuration of new vehicles, valuations for used cars, repair cost calculations and data on vehicle recycling. It will initially cover four fields, including new and used cars, fleet business and after-sales retail.

■ Sterling, Va., information services provider **Neustar** has partnered with Wilton, Conn., analytics firm **Kantar Shopcom** to deliver digital media campaign insights to advertisers across various industry verticals. The partnership allows marketers to measure the impact of online marketing tactics on purchases with Neustar's PlatformOne integrated marketing solution.

■ **The Farnsworth Group**, an Indianapolis research firm, has selected **Market Cube** to be the manager of its Specpan Panel on Market Cube's Panel Cube platform. In addition, Market Cube will provide panel management services to help support the member experience for Specpan's construction-industry panelists.

## Awards/Rankings

■ *Inc.* magazine has ranked Stamford, Conn., research firm **FocusVision** and Elkins Park, Pa., translation services company **CETRA Language Solutions** on its 34th annual Inc. 5000, a ranking of the nation's fastest-growing private companies.

■ The Parlin Board of Governors, an entity of the American Marketing Association (AMA), Chicago, and the American Marketing Association Foundation, has awarded **Kevin J. Clancy** the 2015 Charles Coolidge Parlin Marketing Research Award. The award ceremony took place at the AMA's Advanced Research Techniques Forum in June. The award honors academics and practitioners who have demonstrated leadership and sustained impact on the marketing research profession over an extended period.

■ Nuremburg, Germany, firm **GfK** is holding its Next Generation (NextGen) Competition where undergraduates from North American colleges or universities can submit proposals for market research projects studying the interactions among consumers, mobile

technology and brands. Winners will receive a $1,000 cash award, tour GfK's North American headquarters in New York City to present and work with GfK thought leaders and be featured in GfK's press material.

■ WordStat for Stata, text analysis software from Montreal-based developer **Provalis Research**, was selected as a 2015 Trend-Setting Product by *KMWorld* magazine.

■ **RTi Research**, Norwalk, Conn., has been awarded the Connecticut South 2015 Top Workplaces Award by Hearst Media. The Top Workplace lists are based on results of an employee feedback survey administered by Exton, Pa., survey provider WorkplaceDynamics.

■ Research firm **Cross-Tab**, Mumbai, India, has been awarded a Best-in-Biz Award for most innovative product version of the year for its ctOS Livewire platform.

■ **Jacqueline Beckley**, president and founder of Denville, N.J., research firm the **Understanding and Insight Group**, was given an Award of Distinction from the College of Agricultural and Environmental Sciences at the University of California, Davis in October. The award recognizes those whose contributions and achievements enhance the college's ability to provide research, teaching and innovative outreach.

■ Shelton, Conn., researcher **SSI** presented 2015 QUEST Awards to the following firms at the ESOMAR Congress in September: France-based research firm **Scènes de vie** won the Best in QUEST Award for survey excellence; **MaritzCX**, South Jordan, Utah, won a QUEST Award in a new category, ESOMAR Top 25, which are the largest global research firms as defined by ESOMAR; Shanghai-based firm **Diagaid Marketing Research** won in the general consumer category for multiple projects in conducted in China; Los Angeles-based manufacturer **MGA Entertainment** won for general consumer survey research; **Forrester Research**, Cambridge, Mass., won for business-to-business and **Wakefield**

**Research**, Arlington, Va., won for mobile survey excellence.

## New Accounts/Projects

■ Baldwinsville, N.Y., firm **Research and Marketing Strategies** has received approval from the Center of Medicare and Medicaid Services to administer the 2015-2016 CAHPS for Accountable Care Organizations Survey, which is devised to capture patient experience feedback about care they received from groups of doctors, hospitals and other health care providers.

## New Companies/New Divisions/ Relocations/Expansions

■ **The National University of Singapore** (NUS) has spun off a new start-up, a big data analytics firm called **6Estates**, from the NUS-Tsinghua Extreme Search Centre, a research center it established with Tsinghua University of China. The new Singapore-based start-up converts structured and unstructured data into insights and has strengths in natural language processing for both English and Chinese.

■ New York media services agency **Horizon Media** and Seoul, South Korea-based global marketing and communications firm **Innocean Worldwide** have partnered to launch a standalone media agency network called **Canvas Worldwide**. The new agency will have two main offices in Los Angeles and New York with regional offices in Chicago, Dallas and Atlanta.

■ Palo Alto, Calif.-based **SurveyMonkey** will move its headquarters to Bay Meadows in San Mateo, Calif., in 2017.

■ **Federated Sample**, a New Orleans-based research sample company, has rebranded to **Lucid** to reflect the company's growth. Lucid reorganized its business units Fulcrum (a global exchange for market research sample) and Federated Sample (a full-service sample provider for market research) and they will continue to operate under the Lucid brand umbrella.

■ Chagrin Falls, Ohio, research firm **Opinions Ltd.** opened its 28th mall-based data collection facility in Hurts, Texas - Northeast Mall. The facility specializes in CLT, CAPI, mall intercept, focus groups, pre-recruits and on-site fieldwork. Mike Hall has been appointed as dual facility manager for the new location.

■ Seattle-based business intelligence and analytics firm **Tableau Software** has expanded into China by opening a new office in Shanghai.

■ Warren, N.J., research firm **Lightspeed GMI** has opened a new office in Gurgaon, India.

■ Chris Diener, founder of Salt Lake City-based predictive modeling, analytics and research firm the Modellers, has started a new company, the **Analytics Team Inc.** to provide multivariate analytics from maps and driver models, through CHAID and segmentation, to max-diff and choice modeling or choice-based conjoint. It also offers database, social media and marketing analytics to help internal and external market research teams integrate data.

■ Louisville, Ky., firm **Thoroughbred Research Group** opened a new marketing research call center in Phoenix and has appointed Tim Wirtz as director of field operations for the new center.

■ India-based television ratings company **BARC India** and **TAM India**, a television audience measurement joint venture between Nielsen, New York, and Kantar, London, have formed a new meter management company that will run meter operations and supply raw data to BARC India. Meters will be deployed based on BARC's sample design and ratings will be computed and disseminated through BARC India's software. The ratings data will be the sole trading currency for the country, giving better measurement to advertisers, broadcasters and agencies.

■ London-based brand engagement and communications research firm **Hall & Partners** has opened a new office in Dubai, United Arab Emirates.

The firm's MENA team will be led by Managing Director Ziad Skaff.

■ San Francisco survey solutions firm **Computers for Marketing Corporation** (CFMC) has rebranded to **Survox Inc**.

■ Stamford, Conn., research and technology firm **FocusVision** is moving its London office to a larger location due to a growing employee base.

■ Switzerland-based research and consulting firm **m1nd-set** and Sweden-based firm **Generation Research** have come together to create a travel-retail research agency, called **m1nd-set Generation**. M1nd-set Generation will remain a separate entity from the companies' existing businesses.

■ Sandpoint, Idaho, mobile attribution and analytics platform **Kochava** has opened an office in Seoul, South Korea. David Son, Kochava general manager of Korea, will head up the new operations.

■ Austin, Texas, researcher **Latin Field** has opened a new office in Colombia.

■ **Verve**, a London-based research firm, has opened a new office in Chicago. Tim Martin, vice president of research and consulting, will move from Verve London.

■ **The Roper Center for Public Opinion Research** will relocate to Cornell University in Ithaca, N.Y., from the University of Connecticut as of November 7 and will be known as The Roper Center at Cornell University.

■ U.K.-based out-of-home marketing organization **Outdoor Media Centre** has rebranded as **Outsmart**.

■ Los Angeles media company **AwesomenessTV** is set to launch **Wildness**, an independent research and consulting firm to help brands reach a young audience, primarily 12-to-24-year-olds, who have different media habits than their parents. The new firm will develop custom research on this group, which AwesomenessTV executives refer

to as Generation Z, and has tapped Margaret Czeisler to lead as chief strategy officer.

■ Tokyo-based panel provider **Research Panel Asia** has rebranded itself to **dataSpring**.

■ **The Internet of Things Security Foundation** (IoTSF), an international, collaborative and vendor-neutral initiative established to respond to concerns over security in the Internet of Things, launched in September at the Digital Catapult in London. IoTSF has an executive steering board comprised of technology and security organizations and has named John Haine as the inaugural chair. The initiative is funded by a low-cost membership model and will supplement income through its own operations. It will also accept donations from benefactors who support its mission.

## Research Company Earnings/ Financial News

■ Cincinnati media production firm the **E.W. Scripps Company** has invested $500,000 in **Cintric**, a consumer intelligence company also based in Cincinnati that helps brands, publishers and retailers analyze behavioral data from potential customers and act on insights with personalized experiences and messaging.

■ Mumbai, India, firm **MRSS India** reported revenue of approximately Rs. 55 million, compared to over Rs. 22 million reported the same time last year.

■ Bozeman, Mont., customer experience measurement start-up **IgniteFeedback** has raised over $300,000 to grow its business locally and hire in sales, marketing and development.

■ Paris-based researcher **Toluna** has been approved for a $10 million investment in the company's QuickSurveys product by private investment firm **ITWP Acquisitions Ltd.** The investment will be used to fuel further growth by appointing staff, developing enhancements to market research automation tools and increasing market spend.

# CALENDAR OF EVENTS

••• can't-miss activities

**GutCheck** will host a Webinar, themed "How Google's Product Team Is Leveraging Agile Research to Incorporate User Feedback Early and Often," on November 4 at 1:00 p.m. CDT. http://bit.ly/1jdqbSb

**Marcus Evans** will hold its Design Thinking for Financial Services Conference on **November 5-6** in **New York**. Visit www.marcusevans.com.

**The Incite Group** will hold its Incite Text Analytics Summit: West on **November 5-6** at Hotel Nikko in **San Francisco**. Visit www.incite-group.com.

**New England MRA** will hold its Fall Conference on November 5 at The Conference Center at Waltham Woods in Waltham, Mass. Visit newenglandmra. com.

**IIR** will hold its OmniShopper International event on November 11-13 in Paris. Visit www.iirusa.com/omniintl/ home.xml.

**The Incite Group** will hold its Incite Summit: East event on **November 12-13** at the Marriott Brooklyn Bridge in **New York**. Visit www. incite-group.com.

**ESOMAR** will hold its Global Qualitative 2015 event on November 15-17 in Paris. Visit www.esomar.org.

**The Incite Group** will hold its Content Marketing Summit on November 16-17 at The Hilton Chicago in Chicago. Visit www. incite-group.com.

**MRS** will hold its Financial Services Research conference on November 19 at the Hilton London Bankside in London. Visit www.mrs.org.uk.

**Worldwide Business Research** will hold its NetFinance Interactive event on December 1-3 at the Rancho Bernardo Inn in San Diego. Visit netfinance.wbresearch.com.

**IQPC** will hold its Market Research and Consumer Insights Exchange event on December 6-8 at the Loews Coronado Bay Resort in Coronado, Calif. Visit www. marketresearch-exchange.com.

**The Conference Board** will hold its Customer Insights Seminar on **December 9-10** at The Conference Board Conference Center in **New York**. Visit www. conference-board.org.

**MRA Great Lakes Chapter** will hold its winter conference on **January 20-22** at the Diamond Head Beach Resort and Spa in **Ft. Myers Beach, Fla**. Visit www.glcmra.com.

**IQPC** will hold its Mobile Marketing Exchange event

on **January 24-26** in **Santa Barbara, Calif**. Visit www. mobilemarketingexchange-usa. com.

**MRS** will hold its Kids and Youth Research Conference on January 28 in London. Visit www.mrs.org.uk.

**AMA** will hold its Analytics with Purpose Conference on February 7-9 at the JW Marriott Scottsdale Camelback Inn Resort and Spa in Scottsdale, Ariz. Visit www.ama.org/ Pages/default.aspx.

**Quirk's** will be holding its 2016 Quirk's Event on **February 23-24** at the Marriott Brooklyn Bridge in **New York**. Visit www. thequirksevent.com.

**The Conference Board** will hold its 12th Annual Customer Experience Conference on March 24-25 at the New York Marriott Downtown in New York. Visit www.conference-board.org.

**NMSBA** will hold its Neuromarketing World Forum on April 4-6 in Dubai, United Arab Emirates. Visit www. neuromarketingworldforum. com.

**QRCA** will hold its 2016 QRCA Worldwide Conference on April 13-15 at the Vienna Marriott Hotel in Vienna, Austria. Visit

www.qrca.org.

**PMRG** will hold its Healthcare Marketing Researchers Connect event on May 1-3 at the Gaylord National Hotel in National Harbor, Md. Visit www.pmrg.org.

**AAPOR** will hold its 71st Annual Conference on May 12-15 at the Hilton Austin in Austin, Texas. Visit www. aapor.org.

**LIMRA** will hold its 2016 Marketing and Research Conference on June 1-3 at Disney's Grand Floridian Resort and Spa in Lake Buena Vista, Fla. Visit www.limra.com.

**NMSBA** will hold its Shopper Brain Conference on June 23-24 in Chicago. Visit www. shopperbrainconference.com/ chicago.

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To submit information on your upcoming confer-ence or event for possi-ble inclusion in our print and online calendar, e-mail Sara Potzmann at sara@quirks.com. For a more complete list of up-coming events visit www. quirks.com/events.

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THE QUIRK'S EVENT

FEBRUARY 23-24, 2016 | New York Marriott at the Brooklyn Bridge

*TheQuirksEvent.com*

*Corporate researchers only. Other packages available.
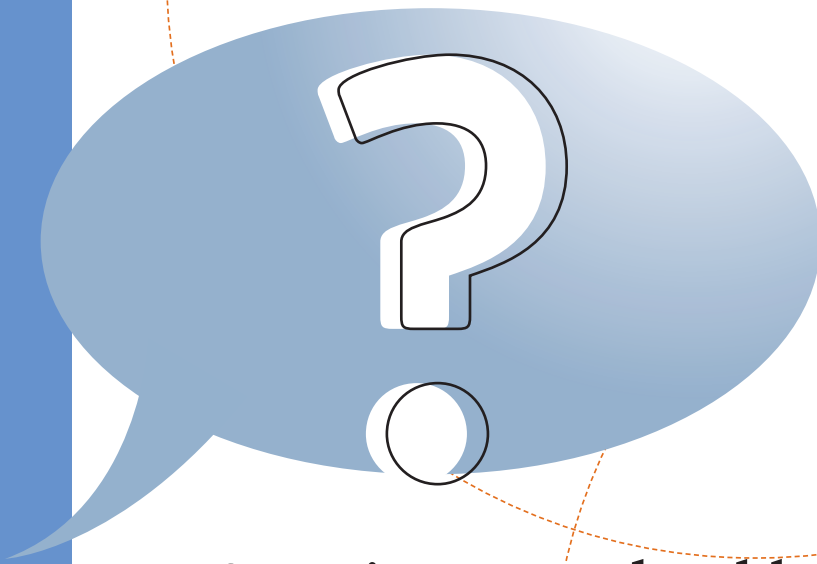
# Questions you should ask when selecting a panel provider

## Recruitment

There are two widely-used methodologies used to recruit panel members into an online panel. Open-source recruitment allows for anyone with access to the Internet to enroll into a panel. Closed, or by-invitation-only, recruitment is a method of inviting only pre-validated individuals or individuals who possess known characteristics to enroll into a market research panel.

## Opting in

The opt-in process might indicate the respondents' relationship with the panel provider. Double opt-in enrollment describes the process by which a check is made to confirm that the person joining the panel wishes to be a member and understands what to expect.

## Sources

Is the panel actively managed or database-driven? Actively-managed panels consist of panel members who voluntarily opt in to participate in a panel and receive invitations for online research surveys. Database contact lists consist of large-scale repositories of e-mail addresses obtained from various sources. Little to no prior agreement and/or consent to receive market re-

quirks.com/articles
ID 20091116

search survey invitations has been given by individuals on these lists. Actively-managed panels have been shown to produce higher response rates and data quality.

## Profiling

How often is profile information updated? What profile data is kept on panel members? How often is this data updated? Extended and up-to-date profile data increases the effectiveness of low-incidence sampling and reduces pre-screening of panelists. If you are seeking to reach a low-incidence or hard-to-reach group, a panel provider with extensive targeting is better equipped to fulfill your request.

## Quality control

What guarantees are there to guard against bad data (i.e., respondent cheating or not concentrating)? Do you have an identity confirmation procedure? Do you have procedures to detect fraudulent respondents at the time of registration? To ensure the quality and reliability of the data, choose a panel provider that employs a quality management system. Quality management systems vary by panel provider but consist of tools and processes to identify and eliminate duplicate members and undesirable respondents from their panel.

Special thanks to Research Now (formerly e-Rewards Inc.), Dallas, and ESOMAR, Amsterdam, The Netherlands, for providing input on the questions.

# 2015

# Research Panels Directory

Welcome to the annual directory of research panels. The directory contains nearly 150 firms that have 460 panels available. The company listings, which begin on the next page, list the company's contact details, as well as a list of the panels they have available. To further help you find a panel that meets your needs, we have included industry and audience cross-index section. This section, which begins on page 91, lists the name of the panel and company and the page number where the contact information can be found.

A searchable version of this directory is available on our Web site at www.quirks.com
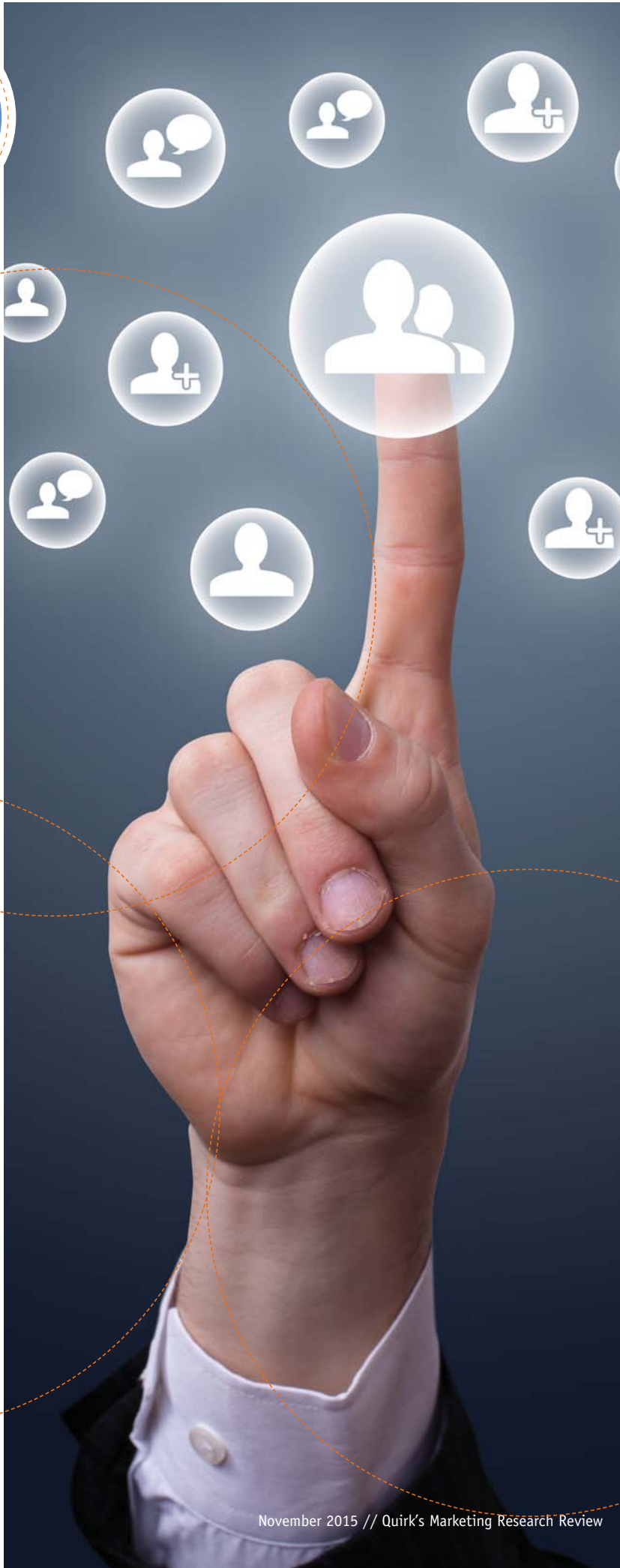
**AFFORDABLE SAMPLES, INC.**
The Other Sampling Company™

**Affordable Samples, Inc.**
Stamford, CT
USA
Ph. 203-637-8563
sales@affordablesamples.com
www.affordablesamples.com
James Sotzing President
Panel Titles:
Affordable Samples Online Consumer Panel
Size: 4,000,000
Affordable Samples Online Business Panel
Size: 1,500,000

The other, better-value sampling company, founded in 1991, providing representative online consumer (4 million) and business (1.5 million) panel samples. Many predefined selectors and fast pre-screening for almost any low-incidence category. Sample-only service or sample plus programming/hosting/tabs. Fast fielding, responsive service and great prices. Sampling expertise and advice. Hundreds of smart research clients.
(See advertisement on p. 75)

**AMERICAN CONSUMER OPINION®**

**American Consumer Opinion®**
A Division of Decision Analyst
Arlington, TX
USA
Ph. 817-640-6166
jthomas2@decisionanalyst.com
www.acop.com
Proprietary Panel Management: Yes
Panel Titles:
American Consumer Opinion®
Size: 8,000,000
Executive Advisory Board
Size: 100,000
Contractor Advisory Board
Size: 20,000
Medical Advisory Board
Size: 35,000
Technology Advisory Board
Size: 125,000
Physician's Advisory Council
Size: 25,000

American Consumer Opinion® is a set of worldwide online panels that reaches over eight million consumers in the United States, Canada, Latin America, Europe, and Asia. Consumers can sign up to become members in one of 11 languages. Complete demographic profiles are maintained for each household. These double opt-in panels are carefully recruited, rigorously managed, constantly cleaned, fairly compensated and continuously refreshed. Sophisticated sampling software balances the sample in each country to make it as representative as possible.

**BORDERLESS ACCESS**

**Borderless Access Panels Pvt Ltd.**
Bangalore
India
Ph. 91-80-49313800 or 866-614-8047 toll-free
rfp@borderlessaccess.com
www.borderlessaccess.com
Dushyant Gupta
Proprietary Panel Management: Yes
Panel Titles:
Borderless Access Panels - Russia - Consumer & B2B
Size: 150,000
Borderless Access Panels - India - Consumer & B2B
Size: 400,000

Borderless Access Panels - South Africa Consum/B2B
Size: 75,000
Borderless Access Panels - Taiwan- Consumer & B2B
Size: 20,000
Borderless Access Panel Philippines Consumer & B2B
Size: 20,000
Borderless Access Panels -New Zealand Consumer B2B
Size: 20,000
Borderless Access Panels - Mexico - Consumer & B2B
Size: 150,000
Borderless Access Panels - Chile - Consumer & B2B
Size: 20,000
Borderless Access Panels - Poland - Consumer & B2B
Size: 20,000
Borderless Access Panels - Turkey - Consumer & B2B
Size: 30,000
Borderless Access Panels - Indonesia Consumer/B2B
Size: 65,000
Borderless Access Panels - China - Consumer & B2B
Size: 225,000
Borderless Access Panels - Brazil - Consumer & B2B
Size: 200,000
Borderless Access Panels - South Korea Consum/B2B
Size: 15,000
Borderless Access Panels - Argentina Consumer/B2B
Size: 60,000
Borderless Access Panels - Australia Consumer B2B
Size: 60,000
Borderless Access Panels - Columbia - Consumer B2B
Size: 20,000
Borderless Access Panels -Nigeria- Consumer & B2B
Size: 20,000
Borderless Access Panels -Singapore- Consumer B2B
Size: 20,000
Borderless Access Panels -Thailand- Consumer & B2B
Size: 20,000

Borderless Access specializes in providing online panel services in emerging market nations. We have over 1.5 million proprietary panelists in 20 countries and conduct almost half a million interviews across all our markets annually. We have also built over 50 custom panels across numerous industry verticals: health and wellness, IT, retail, finance, pharmaceuticals, travel and mobile. We have developed strong specialist panels in both B2B and various consumer niche groups such as IT and health care, while our global alliances let us reach over tens of millions more respondents across 65 countries.

**brinc**
branded research inc.

**Branded Research, Inc.**
San Diego, CA
USA
Ph. 310-740-5318
matt@brandedresearchinc.com
www.brandedresearchinc.com

BRINC is leading online panel and product company leveraging new technologies and social approaches to create better relationships with the respondent community. We build research communities around respondents who are both actively engaged and socially motivated. This provides us with a distinct advantage over traditional online panel companies, and allows us to reach niche panelists while ensuring the quality of the respondent data. Our proprietary online community consists of over 1.8M engaged, qualified, and incentivized survey respondents with more joining every day.
(See advertisement on p. 41)

**C+R RESEARCH**

**C+R Research**
Chicago, IL
USA
Ph. 312-828-9200
info@crresearch.com
www.crresearch.com
Robbin Jaklin President
Proprietary Panel Management: Yes
Panel Titles:
ParentSpeak
Size: 7,800
KidzEyes.com
Size: 10,000
TeensEyes.com
Size: 13,600
LatinoEyes.com
Size: 2,600

At C+R Research, a full-service marketing insights agency, we've been helping brands grow for over 50 years by delivering great research, deep perspective and committed client service. We're known for best-in-class methodologies, high-quality analytical insights and delivering senior-level attention throughout every phase of our clients' projects. We offer an array of customizable techniques, and have focused areas of knowledge and expertise in youth and family, Latinos and shopper insights. Our goal is to equip our clients with the insights to confidently develop successful brand strategies and grow their business.

**CATALYSTMR**
transforming market research data into marketing solutions

**CATALYSTMR**
Oakland, CA
USA
Ph. 800-819-3130
info@catalystmr.com
www.catalystmr.com
Adam Berman
Proprietary Panel Management: Yes
Panel Titles:
US/Intl. Consumer, B2B, Healthcare, & Technology
Size: 3,000,000+

CatalystMR delivers industry-renowned panels made up of consumers, B2B, heath care professionals, IT decision makers and teens from over 53 countries. We deliver quality respondents while providing tremendous cost-savings, increased sample quality and study projectability. We bring you peace of mind and an ROI that makes utilizing our services truly rewarding. Ask us about our eight-pronged approach to quality control. CatalystMR keeps the bots, cheaters, racers and lethargic out of your results because it is our business to care about the quality of your data.

**cint**

**Cint USA Inc.**
Lawrenceville, NJ
USA
Ph. 609-557-7021
learnmore@cint.com
www.cint.com
Proprietary Panel Management: Yes

Cint Engage is a panel management solution that allows you to create, build, analyze and monetize your audience. Like all Cint solutions, Cint Engage connects to OpinionHUB. All panels hosted by Engage are part of this ecosystem. So, in addition of using your panel to conduct your own research, you can also earn money by allowing others to access your group/s to conduct market research studies and keep your audi-

ence engaged. Because of this unique business model you will be able to use Cint Engage at no cost as long as you choose to have your panel available to receive market research studies.

**Clear Voice Research.com, LLC**
Denver, CO
USA
Ph. 303-895-3613
sales@clearvoiceresearch.com
www.clearvoiceresearch.com
Alex Acevedo Managing Director
Panel Titles:
Clear Voice Consumer
Clear Voice Business
Clear Voice Medical

Where does sample come from? We manage the sample supply chain from top to bottom. Clear Voice Research works with the world's largest market research and consulting companies on quant and qual research execution. We have delivered on thousands of projects with our online consumer, B2B and health care panels. We build and manage private research panels with our in-house panel management and e-mail platform. We also offer customized recruiting, programming, CATI, data processing, customer satisfaction and IHUTs. Contact us today to learn why Clear Voice is the clear choice for your project.

**Consumerfieldwork GmbH**
Hamburg
Germany
Ph. 49-40-74041980
info@consumerfieldwork.com
www.consumerfieldwork.com
Christian Brieskorn
Panel Titles:
www.Consumer-Opinion.com
   Size: 75,000

Consumerfieldwork GmbH is an independent online research panel provider. We offer high quality samples. Our home panel in Germany is sized among the top 5 German panels. We also have the UK. We offer consumer and B2B targets (including IT Pros). As a traditional online research panel we email invitations to registered members: No survey router, no river sampling. Customers receive redirects for reporting bad quality (straight liners, racers, etc.) and don't have to pay these. For payout we use bank transfer. No Amazon vouchers, no PayPal. Respondents are not virtual, but identity validated.

**dataSpring**
formerly Research Panel Asia
Culver City, CA
USA
Ph. 714-262-2790
contact@d8aspring.com
www.d8aspring.com
Jeff Gerken
Panel Titles:
Survey On - Taiwan Panel
   Size: 20,000
Survey On - Hong Kong Panel
   Size: 5,000
91wenwen.com - China Panel
   Size: 270,000
Panelnow.co.kr - South Korea Panel
   Size: 100,000
Research Panel - Japan Panel
   Size: 600,000

dataSpring offers 1-stop research solutions to ensure that market researchers around the world succeed. We provide Global Sample coverage in over 35 countries, Full Service, and a proprietary Process Automation Tool. With our 24/7 operations hub in Manila, we're uniquely able to manage projects around the clock and support our clients with each step of the research process. The company has offices in Los Angeles, New York, London, Tokyo, Shanghai, Seoul, Singapore, and Manila.

**Datatelligence Online, a division of CRG Global**
Ormond Beach, FL
USA
Ph. 866-209-2553
sales@datatelligence.com
www.datatelligence.com
Jeffrey Fiesta
Proprietary Panel Management: Yes
Panel Titles:
Datatelligence Online
   Size: 400,000

Datatelligence Online is a nationally represented online community of over 400,000 active members. Unlike others, we recruit using standard online practices and face-to-face recruitment. We offer VideoSnaps, audience testing, community access panels and full-service IHUT capabilities. Clients not only have access to panelists online, but they can also have Datatelligence Online arrange for face-to-face and telephone interviews. We offer clients in-house shipping, handling and procurement of products for IHUT testing. All data is validated by our patented Confidata system.

**Decision Analyst, Inc.**
Arlington, TX
USA
Ph. 817-640-6166 or 800-262-5974
jthomas@decisionanalyst.com
www.decisionanalyst.com
Jerry W. Thomas President/CEO
Proprietary Panel Management: Yes
Panel Titles:
American Consumer Opinion®
   Size: 8,000,000
Technology Advisory Board
   Size: 125,000
Executive Advisory Board
   Size: 100,000
Physician's Advisory Council
   Size: 25,000
Medical Advisory Board
   Size: 35,000
Contractor Advisory Board
   Size: 20,000

Precise and consistent data are fundamental to the validity and projectability of research results and analytic inferences. Decision Analyst's leading-edge research and analytics are made possible by the consistency and reliability of its proprietary online panels and systems. Decision Analyst's double-opt-in online panels are rigorously managed, fairly compensated and continuously refreshed. During the mid-'90s, Decision Analyst helped pioneer the development of online research technologies and continues as a world leader in online research methods.

**eCGlobal Solutions**
Miami Beach, FL
USA
Ph. 786-269-0377
rfp@ecglobal.com
www.ecglobalsolutions.com/
Proprietary Panel Management: Yes
Panel Titles:
eCGlobal.com
   Size: 1,200,000

eCGlobal Solutions is a specialist in technology-driven marketing research services. It creates smart connections between brands and consumers, generating high-quality insights, stimulating co-creation and taking the relationship with the consumer to the next level. Our portfolio of products and services includes the development of insights communities, social and mobile apps for consumer insights and brand engagement and a DIY platform integrated with our proprietary premium online panels of more than 1.2 million consumers in Latin America.

**Esearch.com, Inc.**
Palos Verdes Peninsula, CA
USA
Ph. 310-265-4608
esearch@esearch.com
www.esearch.com
Proprietary Panel Management: Yes
Panel Titles:
Esearch Consumer Panel (U.S.)
Esearch Business/IT Panel
Esearch Children/Teens Panel

Since 1995, Esearch.com Inc. has provided online sample for Internet research. Our extensive consumer panel is profiled to enable targeting of early adopters, people with medical conditions, homeowners, pet owners, sports (and other) enthusiasts and much, much more.
(See advertisement on p. 71)

**Focus Pointe Global - Online**
Philadelphia, PA
USA
Ph. 215-561-5500 or 888-873-6287
OneCall@FocusPointeGlobal.com
www.focuspointeglobal.com
Ileen Branderbit Executive VP
Proprietary Panel Management: Yes
Panel Titles:
FPG Patient Panel
    Size: 900,000
FPG QualPanel
    Size: 1,500,000

Focus Pointe Global is a leading national provider of high-quality qualitative/quantitative marketing research data collection services. The 1.5 million-member FPG QualPanel™ provides practitioners the articulate, engaged and committed respondents required for any marketing research project, no matter the methodology. FPG owns/operates 18 premier focus group facilities in the major metropolitan markets that are also the major DMA's for quantitative research projects. FPG is committed to providing its clients unrivaled research solutions with professional integrity and the highest level of service quality.
(See advertisement on p. 3)

**GfK**
New York, NY
USA
Ph. 212-240-5300
us@gfk.com
www.gfk.com
Pat Graham
Proprietary Panel Management: Yes
Panel Titles:
National Shopper Lab
    Size: 17,000,000
Cada Cabeza℠
    Size: 10,000
KnowledgePanel Latino ℠
    Size: 9,000
KnowledgePanel®
    Size: 60,000
Consumer Access Panel
    Size: 1,000,000

GfK is one of the world's leading full-service market research companies, with 13,000 experts discovering new insights into ways people live, think and shop in over 100 countries. Several of our panels make use of leading-edge digital passive measurement, device agnostic approaches and mobile app-based solutions. We offer access to gen pop, consumer, Hispanic and loyalty card panels, as well as to several of the world's largest databases. In the U.S., KnowledgePanel® offers the only large-scale probability-based online panel in the industry for clients' most critical research.

**InnovateMR, LLC**
Encino, CA
USA
Ph. 818-584-2090
matt@InnovateMR.com
www.innovatemr.com/
Matt Dusig, Co-Founder
Proprietary Panel Management: Yes
Panel Titles:
InnovateMR, LLC
    Size: 1,200,000

Innovate was founded in 2014 by Matt Dusig and Gregg Lavin (goZing and uSamp founders), and George Llorens. Innovate offers human-powered, advanced sampling solutions, through its team of expert research consultants. As pioneers of online sampling, Innovate provides exclusive access to its premium recruited First Class PanelTM of global online respondents. Innovate's methods have been proven and trusted by thousands of corporations around the world. Quality panels, sample management, panel recruitment and survey programming are the primary solutions offered by Innovate.

**Instantly™**
Encino, CA
USA
Ph. 866-872-4006
sales@instant.ly
www.instant.ly
Proprietary Panel Management: Yes
Panel Titles:
Online Panel
Mobile Panel

Instantly™ is the world's largest audience and insights platform, providing researchers and marketers with immediate access to consumers and automated insights tools to make faster, better decisions. Instantly is based in Los Angeles, with offices in the United States, Europe and Asia. For more information, visit www.instant.ly.
(See advertisement on the inside back cover)

**InterfaceAsia**
Interface In Design (IID) Inc.
Torrance, CA
USA
Ph. 310-212-7555
projectteam@interfaceasia.com
www.interfaceasia.com
Etsuko Morihara
Proprietary Panel Management: Yes
Panel Titles:
Interface Asia Consumer
    Size: 630,000 in Japan;466,000 in China;165,000 in Korea
InterfaceAsia B2B / IT
    Size: 180,000 in Japan; 70,000 in China; 97,000 in Korea
InterfaceAsia Medical (Physician)
    Size: 142,000 in Japan; 80,000 in China; 15,000 in Korea
InterfaceAsia Medical (Patients)
    Size: 50,000 in Japan; 34,000 in Korea; 34,000 in China

InterfaceASIA is a provider of market research and online access panels for Asian countries. Let InterfaceASIA help your company understand, penetrate, and capture the Asian market. With extensive experience in various industries and expansive research resources, InterfaceASIA provides the cultural and demographic intelligence you need for a successful business in Asia. With proprietary online Consumer, B2B/IT, Automotive, and Medical Doctor panels in Japan, China, South Korea, and India, we are able to target specific respondents.

**Kinesis Survey Technologies, LLC**
Austin, TX
USA
Ph. 512-590-8300
sales@kinesissurvey.com
www.kinesissurvey.com
Proprietary Panel Management: Yes

Kinesis Panel™ is the world's most complete panel management platform. With an intuitive, drag-and-drop query tool and state-of-the-art sampling capabilities, Kinesis Panel™ facilitates the creation of communities that offer minipolls, social media, real-time incentive redemptions and much more. Using existing data to build a panel or starting from scratch, Kinesis has you covered with real-time reporting, advanced security, and monetization options for excess panelists. Couple those features with the incredible programming and management services offered by Kinesis, and you have the industry's best panel management service provider. This firm offers proprietary panel management services.

**KL Communications, Inc.**
Red Bank, NJ
USA
Ph. 732-224-9991
inquiry@klcommunications.com
www.klcommunications.com
Kevin Lonnie, CEO/Founder
Proprietary Panel Management: Yes

KL Communications (KLC) is a collaborative research agency that specializes in co-creation via online communities and its proprietary CrowdWeaving™ service. CrowdWeaving brings the seeds of customer inspiration to your product ideation challenges and helps you develop a better product. KLC empowers consumers and brands to collaborate and create together, providing your brand and customers with shared experiences that provide inspiration and drive innovation. Our suite of collaborative tools enables our clients to better communicate with their consumers to make more informed decisions.

**Lightspeed GMI**
Warren, NJ
USA
Ph. 908-605-4500
dshanker@lightspeedresearch.com
www.lightspeedgmi.com
David Shanker, CEO Americas
Proprietary Panel Management: Yes
Panel Titles:
Lightspeed Consumer Panel
Lightspeed Sports and Hobbies Specialty Panel
Lightspeed Travel and Leisure Specialty Panel
Lightspeed Health and Wellness Specialty Panel
Lightspeed Finance Specialty Panel
Lightspeed Mobile Phone Specialty Panel
Lightspeed Beauty & Personal Care Specialty Panel
Lightspeed Family & Household Specialty Panel
Lightspeed B2B ELITEOpinion Specialty Panel
Lightspeed Media Consumption Specialty Panel

Lightspeed Automotive Specialty Panel
Lightspeed Beverages Specialty Panel

For market researchers, agencies and corporate marketers seeking a deeper understanding of consumers, Lightspeed GMI provides digital access to the most qualified panelists whenever, wherever and in whatever segments needed. Lightspeed GMI's thorough panelist prescreening process and large global respondent pool delivers business-ready results fast and cost-effectively. Through advanced research technologies, proven methodologies and market research expertise, it meets the industry's demand for deeper quantitative and richer qualitative data in a single, trusted partner.
(See advertisement on p. 5)

**Luth Research**
San Diego, CA
USA
Ph. 800-465-5884 or 619-234-5884
info@luthresearch.com
www.luthresearch.com
Janeen Hazel, Marketing Director
Proprietary Panel Management: Yes
Panel Titles:
SurveySavvy
    Size: 3,000,000+

For more than 35 years, Luth Research has been advancing next-generation consumer intelligence with innovative market research approaches. Powered by our online research panel, SurveySavvy®, and crossplatform digital tracking capabilities, as well as traditional focus group and call center services, our innovative research methods help today's businesses thrive.

**M3 Global Research**
Fort Washington, PA
USA
Ph. 202-293-2288 x9203 or 202-441-5522
MarketResearch@usa.m3.com
www.research.m3.com
Panel Titles:
M3 Global Online Physician Community Japan
M3 Global Online Physician Community Korea
M3 Global Online Physician Community Europe Plus
M3 Global Online Physician Community China
M3 Global Online Physician Community USA

M3 Global Research provides the most comprehensive and highest quality market research recruitment and support services available to the global health care industry with relationships with over two million physicians in more than 70 countries worldwide. M3 Global Research operates an ISO 26362 certified panel with the highest quality data collection and project management capabilities that cover the spectrum of quantitative and qualitative techniques utilized today. M3 has offices in Tokyo, Washington, D.C., Fort Washington, Pa., Rochester, N.Y., San Mateo, Calif., Oxford, London and Seoul.

**MindField Online Internet Panels**
(A McMillion Company)
Charleston, WV
USA
Ph. 304-343-9650
jmace@mcmillionresearch.com
www.mindfieldonline.com
Jay Mace, Vice President
Proprietary Panel Management: Yes
Panel Titles:
MindField Health Ailment & Condition
MindField General Consumer Panel
MindField Homeowner and Lawncare Panel
MindField Mothers - Children Panel
MindField Electronics and Gaming Panel
MindField Health and Beauty Aids Brand Panel
MindField Medical: Physician and Patient Panels
MindField Pet Owner Panel
MindField Travel and Leisure Panel
MindField Vision Care Panel
MindField Technology
MindField Teen Panel

MindField is your dependable, high-quality source for online research with no minimum panel fees. Using the most sophisticated combination of software and hardware and the latest in fiber technology, put the power of MindField behind your projects. We provide 24/7 project management and monitoring, online reporting and our programmers are dedicated to your needs throughout all phases of your research.
(See advertisement on p. 45)

**Minter Research**
Mona Vale, NSW
Australia
Ph. 61299795277
gminter@minter.com.au
www.minter.com.au
Geoff Minter, Managing Director
Panel Titles:
Minter Group Panel – Consumer
    Size: 7,500
Minter Group Panel - Health Care
    Size: 25, 500

In mid-2015 we finished updating our MAP (Minter Advisory Panel) to over 35,000 HCPs. In 2000, The Minter Group started recruitment of healthcare practitioners to establish our Healthcare Panels for Australia and New Zealand. This has been built to the level where we are at, or close to, the universe in most specialties less opt outs. In 2003 we established the Minter Australian General Public Online Panel of 7000 members. We have researched most industries in the past 15 years and also built Australian Business and IT Panels. From our Sydney facilities we also do CATI, TDIs and IDIs.

**mo'web GmbH**
Dusseldorf
Germany
Ph. 49-211-8-28-28-00
info@mo-web.net
www.mo-web.net
Proprietary Panel Management: Yes
Panel Titles:
Consumer Panel
    Size: 800,000
B2B Panel
    Size: 340,000

mo'web research is one of the very first German

market research institutes specialized in online research. We cater to all your market research requirements - from a simple needs assessment through to full service research. With over 800.000 private consumers and just above 340.000 business decision makers in our proprietary panels you can explore even the most exotic target groups. Take advantage of our global reach and contact your respondents in Europe, Africa and Latin America. All through an independent company which is still managed by the founders.
(See advertisement on p. 63)

**myCLEARopinion Panel**
Troy, MI
USA
Ph. 248-633-4930
info@mcopanel.com
www.myclearopinionpanel.com/
Proprietary Panel Management: Yes
Panel Titles:
myCLEARopinion Panel
    Size: 500,000+

myCLEARopinion specializes in high-quality B-to-B industry sample, providing access to a unique and powerful audience of decision-makers for your research projects. Our responsive and active panel members form a carefully nurtured online community. Areas of expertise include: architecture/construction/maintenance; HVACR; flooring/floor maintenance; plumbing; safety and security; manufacturing and logistics; food and beverage; food retailing; packaging; specialty food markets; casino gaming. Our dedication to customer service and our robust levels of communication and responsiveness ensure that we can deliver the right sample when you need it.
(See advertisement on pp. 10-11)

**Olson Research Group, Inc.**
Yardley, PA
USA
Ph. 267-487-5500
info@olsonresearchgroup.com
www.olsonresearchgroup.com
Paul Allen
Proprietary Panel Management: Yes

Olson Research Group has been supporting the life sciences sector for nearly 2 decades by providing both qualitative and quantitative market research services and harnessing the latest technological offerings. What drives our deliverables is our proprietary database of HEALTHCARE PROFESSIONALS, PAYERS and PATIENTS who represent all corners of the healthcare space. The database is continually refreshed with new participants and thus differs from static panels that reach out to the same respondents repeatedly. The industry-experienced professionals housed in both our East Coast and West Coast offices proudly provide a full spectrum of services, from pure fieldwork/recruitment to the full execution of projects; from survey design to analytical outputs, using qualitative and quantitative research methods.
(See advertisement on p. 57)

**OMI (Online Market Intelligence)**
Moscow
Russia
Ph. 7-495-660-94-15
rfp@omirussia.ru
www.omirussia.ru/en/
Dr. Alexander Shashkin, CEO
Proprietary Panel Management: Yes
Panel Titles:
B2C Automotive Panel Russia
    Size: 105,000
B2C Panel Russia
    Size: 800,000
B2C Panel Belarus
    Size: 44,000
B2C Panel Kazakhstan
    Size: 26,000
Physician Panel Russia
    Size: 95,000
User-Centric Panel
    Size: 32,000
Patient Panel Russia
    Size: 490,000
B2C Panel Ukraine
    Size: 150,000
B2B IT Panel Russia
    Size: 9,000

OMI is the only ISO 20252 and 26362 certified online research company in Russia. OMI holds the gold certificate for quality and consistency awarded by the U.S.-based online panel auditor Mktg Inc. We provide online survey programming and data collection through proprietary B2B and B2C online panels in Russia, Ukraine, Kazakhstan and Belarus with real-time data visualization. With OMI online panels you can access more than 1000,000 consumers, 110,000 vehicle owners, 9,000 IT professionals and 95,000 physicians. We also provide mobile research opportunities.
(See advertisement on p. 53)

**Panel Direct**
Wayne, PA
USA
Ph. 215-367-4100
rfppanel@paneldirectonline.com
www.paneldirectonline.com
Meghan Surdenas Business Development Director
Proprietary Panel Management: Yes
Panel Titles:
Panel Direct (Focus Forward) Online Panel
    Size: 400,000

Panel Direct provides high-quality B2B, B2C, patients and medical professional panelists for all types of research since 2003. Our double-opt-in panel is the first choice for all U.S.-based studies where targeting and robust responses are a key element of the research. Providing high-value audiences, we collect hundreds of data points and get right to the perfect research participant with speed and accuracy. Panel Direct offers unique services including mixed-mode panel recruitment, physical-address validation, dedicated project management and high-quality sample.

**Radius Global Market Research**
New York, NY
USA
Ph. 212-633-1100
info@radius-global.com
www.radius-global.com
Chip Lister
Proprietary Panel Management: Yes
Panel Titles:
Know More™ Internet Panel
    Size: 6,000,000

Radius Global Market Research excels at addressing complex issues in development, marketing and communications for Fortune 500 companies, multinational companies and other industry leaders. We are a global team of smart marketers and savvy research professionals with diverse experience across dozens of industries. We are committed to bringing cutting-edge, custom research solutions to every engagement so that you can maximize your brand growth. This is our single-minded focus: taking brands to higher levels of performance and success.

**Rare Patient Voice, LLC**
Towson, MD
USA
Ph. 410-218-0527
wes.michael@rarepatientvoice.com
www.rarepatientvoice.com
Proprietary Panel Management: Yes
Panel Titles:
Cancer Patients & Caregivers
    Size: 27,000
Hemophilia Patients and Caregivers
    Size: 1,000
Rare Disease Patients & Caregivers
    Size: 10,000
Hemophilia Nurses
    Size: 60

Rare Patient Voice recruits hard-to-find patients and caregivers for both qualitative and quantitative studies in the U.S. and Canada. We sign up patients in-person at patient events- conferences, walks, educational symposia, etc. Patients spread the word to others in their support groups, closed Facebook pages, etc. so we can provide quality respondents quickly (usually about two weeks). Some of our panels include: hemophilia, cancer (all types), multiple sclerosis, cystic fibrosis, sickle cell, HIV, PAH, Huntington's, epilepsy, spinal muscular atrophy, lupus, etc.

**Reckner Healthcare**
Chalfont, PA
USA
Ph. 215-822-6220
sphillippe@reckner.com
www.recknerhealthcare.com
Susan Phillippe, Director
Proprietary Panel Management: Yes
Panel Titles:
MCO/PBM Payer Panel
    Size: 100+
Reckner Physicians Panel
    Size: 300,000+
Reckner Healthcare Allied Professionals Panel
    Size: 200,000+

Reckner Healthcare provides access to one of the most responsive databases of verified U.S. physicians and allied health care professionals. Our project manag-ers have extensive experience in local, national and global studies, both qualitative and quantitative. Reckner Healthcare has noted skill in reaching low-incidence or difficult-to-find health care professionals. We bring expertise to every quantitative project, from sample management to complex programming logic and multiple-language surveys. All Internet studies are supervised by experienced project managers and securely hosted on Reckner servers.
(See advertisement on p. 65)

**ReRez**
Dallas, TX
USA
Ph. 774-212-0033 or 214-269-3939
Bids@rerez.com
www.rerez.com
James West
Proprietary Panel Management: Yes
Panel Titles:
ReRez Consumer Panel
ReRez B2B Panel
ReRez Physicians Panel
ReRez Hispanics Panel

ReRez specializes in online panel research Internationally and Nationally (50M Worldwide) w/ Mixed Mode capabilities (B2C, B2B, Patients, Hispanic, Patients) . Ask about our solutions for low-incidence, decision makers, IT, management-level, physicians, hard-to-target ailments and Hispanics. We specialize in quantitative surveys online and by phone with the ability to show visuals via phone interviewing. Over 24 yrs experience Online Panel and Methodology Specialists. Whether simple programming, real-time reporting or just data collection, we won't leave you hanging.

**Research Now**
Plano, TX
USA
Ph. 888-203-6245 or 214-365-5000
info@researchnow.com
www.researchnow.com
Proprietary Panel Management: Yes
Panel Titles:
Valued Opinions Panel
e-Rewards Opinion Panel

Research Now Group, Inc., headquartered in Plano, Texas, is the global leader in digital data collection to power analytics and insights. It enables data-driven decision making for clients who listen to and interact with the world's consumers and business professionals through Research Now's online panels, as well as mobile, digital and social media technologies. The company operates in 38 countries, from 24 offices across the globe, and is recognized as the market research industry's leader in quality, scale and customer satisfaction. For more information, go to www.researchnow.com.
(See advertisement on p. 13)

**ROI Rocket**
Denver, CO
USA
Ph. 303-895-3572
bids@roirocketcorp.com
www.roirocket.com
Tim Wilson
Proprietary Panel Management: Yes
Panel Titles:
ROI Rocket
    Size: 800,000

ROI Rocket's exceptional attention to detail and expansive reach has proved a successful formula recruiting panelists for some of the world's largest brands and companies. Our recruitment solution enables us to provide quality, responsive panelists within hard to reach groups, such as C level executives, ITDMs, doctors, and disease sufferers to ensure low attrition. Whether you are recruiting a large, national research panel or a smaller community, ROI Rocket's team of professionals can help you build, host, and recruit your panel, community, focus group, or clinical trial.

**RONIN Corporation**
Princeton, NJ
USA
Ph. 609-452-0060
info@ronin.com
www.ronin.com/dc
Proprietary Panel Management: Yes
Panel Titles:
International Physicians
    Size: 150,000
International IT Decision Makers
    Size: 110,000

RONIN delivers primary research data from Healthcare & IT Professionals across more than 50 countries! We offer a Healthcare & IT Professionals Panel, built by phone and constantly refreshed by expert medical & B2B local language interviewers, a global phone center to contact business decision makers and physicians – particularly important when recruiting from client lists or hard-to-reach samples, sector specific project managers, programmers, translators and coders, and carefully selected local panels for a single supplier solution on global projects supporting the RONIN panel.

**SERMO**
New York, NY
USA
Ph. 212-358 0800
info@sermo.com
www.SERMO.com
Stephane Malka VP Global Head Data Services
Panel Titles:
WorldOne's Global Eye Care Panel
    Size: 18,434
WorldOne's Global Pharmacists Panel
    Size: 77,244
WorldOne's Global Veterinarian Panel
    Size: 34,779
WorldOne's Global Nurse Panel
    Size: 372,021
WorldOne's Global Dentist Panel
    Size: 37,456
WorldOne's Global Physician Panel
    Size: 732,497

SERMO is the #1 global healthcare data collection company with a vast research network spanning 80 countries and the leading social network for doctors. SERMO harnesses the collective wisdom of doctors through custom research and its unique, award-winning innovative, real-time intel tool to get insights in hours from the most engaged HCPs. In 15 years, SERMO has become the largest global healthcare data collection company, helping clients garner insight from a network of 1.8 million HCPs. By partnering with SERMO, researchers can achieve all of their data collection needs from one fast, reliable source.

**SHC Universal**
New York, NY
USA
Ph. 212-290-7642
jerry.arbittier@shcuniversal.com
www.shcuniversal.com/
Jerry Arbittier, President of Healthcare
Panel Titles:
Global Healthcare Panel
    Size: 2 million

SHC Universal was founded on the ideal of providing the most accurate, cost-effective access to the ecosystem of health care professionals and patients for comprehensive market knowledge to affect health outcomes. With over two million health care professionals (physicians, hospitalists, nurses, nurse specialists, payer/managed care professionals, pharmacy directors, pharmacists, medical directors, dentists, veterinarians, optometrists, physician office staff, administrative hospital personnel, patients and caregivers) we offer an unprecedented worldwide gateway for quantitative/qualitative research.

**Signet Research, Inc.**
Englewood, NJ
USA
Ph. 201-945-6903 or 201-945-6904
joanna@signetresearch.com
www.signetresearch.com
Joanna Zanopoulo, President
Proprietary Panel Management: Yes
Panel Titles:
Custom/Proprietary Panels and Community Panels

Our keen understanding of the dynamics taking place in today's publishing industry allows us to develop the most innovative research tools and solutions to meet content, advertising and multi-platform business needs while continuing to provide the best value and service in the marketplace since 1968. We demonstrate ad effectiveness to substantiate media buys, profile audiences to attract advertisers, evaluate content to enhance consumer engagement, build panels and communities, measure media usage and preferences to optimize media platforms and strengthen advertiser partnerships with custom studies.

**SoapBoxSample**
Van Nuys, CA
USA
Ph. 818-528-5296
info@soapboxsample.com
www.soapboxsample.com
Jacqueline Rosales, Chief of Operations
Proprietary Panel Management: Yes
Panel Titles:
MySoapBox
    Size: 400,000

SoapBoxSample offers a fresh approach to online research. If you are looking for full study design and analysis, or data collection only, our focus is online interactive research. From traditional online surveys to In Home Usage Tests (IHUTS) to technology testing or mobile research, SoapBoxSample offers a variety of solutions. SoapBoxSample is a leader in new techniques and approaches including Passive Metering, Geo-Fencing and App based research design. Our proprietary panel, MySoapBox Panel is recruited from a variety of channels, resulting in a panel that is loyal and engaged.

**SSI**
Shelton, CT
USA
Ph. 203-567-7200
info@surveysampling.com
www.surveysampling.com/
Proprietary Panel Management: Yes
Panel Titles:
QuickThoughts (Canada)
SurveySpot (United States of America)

Meinungswelt (Austria)
OpinieLand (Belgium)
Opinionsland (Denmark)
Mielipidemaailma (Finland)
Opiniolandia (Spain)
Asiktstorget (Sweden)
Meinungswelt (Switzerland)
OpinionWorld (United Kingdom)
OpinionWorld (Taiwan)
QuickThoughts (Austria)
mitpanel.dk (Denmark)
MundodeopiniÃµes (Brazil)
Alumni Opinions (United States)
FikirPazari (Turkey)
Miles for Thoughts (United States)
Opinion Miles Club (Japan)
PINS e-Say (Finland)
Que Crees (United States)

SSI is the premier global provider of data solutions and technology for consumer and business-to-business survey research, reaching respondents in 100+ countries via Internet, telephone, mobile/wireless and mixed-access offerings. SSI staff operates from 30 offices in 21 countries, offering sample, data collection, CATI, questionnaire design consultation, programming and hosting, online custom reporting and data processing. SSI's 3,600+ employees serve more than 2,500 clients worldwide.
(See advertisement on wrap and back cover)

**Think Virtual Fieldwork**
Palm Beach, FL
USA
Ph. 212-699-1901
ray@thinkvirtualfieldwork.com
www.thinkvirtualfieldwork.com
Raymond Benack, President
Proprietary Panel Management: Yes

At Think Virtual Fieldwork we are dedicated to providing high-quality, online data collection services, including sample management, hosting and programming, online data delivery and superior customer service. When you work with Think Virtual Fieldwork you choose which services are right for you. Think Virtual Fieldwork delivers them to you promptly and professionally. We can help make your life easier. Think smart, think fast, think Virtual Fieldwork!

**3Q GLOBAL**
Jupiter, FL
USA
Ph. 561-745-3602 or 855-799-0003
info@3Q-Global.com
www.3Q-Global.com
Traci Wood, Director
Proprietary Panel Management: Yes

3Q GLOBAL, a full service research firm, offers real answers to real questions. Our experience includes, study design, project management, data collection, text analytics, and executive summary reporting. Our data collection methodologies include field work, mall/hall interviewing, CATI/CAWI, online surveys, in person and online focus groups, market research communities and bulletin boards. 3Q GLOBAL's service and quality is unmatched. Providing real value, real solutions, and a pro-active approach to answer all of your research questions is what we do best. Call us for your research needs.

**Toluna**
Wilton, CT
USA
Ph. 203-834-8585
Toluna@toluna.com
www.toluna-group.com/
Mark Simon, Managing Director - N. America
Proprietary Panel Management: Yes
Panel Titles:
Teen Panel
Leisure Activities Panel
Moms and Babies Panel
Physicians Panel
Home Improvement Panel
Automotive Panel
Entertainment Panel
B2B/IT Panel
Cosmetic Panel
Finance Panel
Green Consumer Panel
Household Technology Panel
Media Panel
Mobile Panel
Ailment Sufferers Panel
Food and Beverage Panel
Shopping Panel
Sports Panel
Video Gamers Panel

Toluna is a leading digital market research and technology company. A pioneer in the dynamic world of marketing research, data collection, reporting and visualization, Toluna brings together people and brands in the world's largest social voting community of more than 6 million members. As a leading all-in-one global source for actionable insights, we help market researchers, insights professionals and companies anywhere in the world make clearer and better business decisions that drive better business results. Generate valuable consumer insight by a combination of online market research panels and proprietary, industry-leading technology.

**Turning Point Research**
Las Vegas, NV
USA
Ph. 702-483-4000
amedick@turningpointresearch.com
www.TurningPointResearch.com
Alex Medick, Vice President
Proprietary Panel Management: Yes
Panel Titles:
Turning Point Research

Turning Point Research is the premier proprietary panel building service in the USA. In today's online research world, typical panels are filled with poor quality respondents, inactive users and professional online survey takers. That is why Turning Point Research is taking a new lead on bringing the quality we are known for with our CATI work to the online space. We research and invite hand selected individuals as part of the panel. We also look into panelists' backgrounds to make sure they are up to the high quality we strive for. Contact us today to find out how we can get you the quality you deserve!

**Verve North America Inc.**
Chicago, IL
USA
chicago@addverve.com
www.addverve.com
Proprietary Panel Management: Yes

A full-service specialist in community panels for research - quant, qual, online, offline, on mobile.
www.addverve.com

**Verve Partners Ltd**
London
United Kingdom
Ph. 44-207-928-4314
london@addverve.com
www.addverve.com
Ana Garcia
Proprietary Panel Management: Yes

A full service specialist in Community Panels for research - quant, qual, online, offline, on mobile
www.addverve.com

**YouGov**
Redwood City, CA
USA
Ph. 650-462-8000
katy.moran@yougov.com
www.yougov.com
Katy Moran, VP Business Development
Panel Titles:
YouGov PollingPoint
    Size: 1,500,000

YouGov is a leading international full-service research and consulting company and a pioneer in the use of technology to collect higher quality, in-depth data for the world's leading businesses and institutions so that they can better serve the people that sustain them. With offices throughout the US, UK, Europe, the Middle East and Asia, YouGov leverages its online sampling, research expertise and consulting experience to provide clients with sophisticated market strategy, market analytics, and survey and forecasting services.

## African-American

**Affordable Samples Online Consumer Panel, Affordable Samples, Inc. p. 80**
Custom/Proprietary Panels and Community Panels, Signet Research, Inc. p. 85
Datatelligence Online, Datatelligence Online, a division of CRG Global p. 81
**e-Rewards Opinion Panel, Research Now p. 84**
**Esearch Children/Teens Panel, Esearch.com, Inc. p. 81**
**Esearch Consumer Panel (U.S.), Esearch.com, Inc. p. 81**
Know More™ Internet Panel, Radius Global Market Research p. 84
KnowledgePanel®, GfK p. 82
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# CORRECTIONS

• In the Corporate Research Report, which was distributed with the Researcher SourceBook in September, Figure 6 on page 12 had an incorrect legend. The color-coding for "Neither Effective nor Ineffective" and "Very Effective" was reversed. A PDF containing the corrected version can be accessed here: www.quirks.com/pdf/corporateresearchreport.pdf.

• In the October issue, a sidebar accompanying the article "The cloud awaits yet health care hesitates" was not included. It is presented below:

# A better patient experience

Hospital architects and interior designers will cite the importance of natural light, calming colors and other features to enhance the patient experience. But technology plays a significant role as well. When asked specifically what technology solutions they believe will have the greatest impact on the patient experience in the next two to five years, the Peak 10 survey respondents cited these three trends, all of which can be powered and expedited by software implementation, virtualization and cloud technologies.

**Trend #1: Mobility**

From researching medications to quickly accessing important patient data, physicians and other care givers are discovering more ways to use mobile devices to improve care delivery. Mobility is quickly becoming an essential vehicle to help health care institutions better meet changing patient expectations, deal with staff and resource shortages and respond to government requirements and incentives. Clinical mobility spending in the U.S. is expected to increase with growth accelerated by the adoption of electronic health record (EHR) systems, electronic prescribing and computerized physician order entry and health information exchanges.[1]

**Trend #2: EHRs**

Among the key features of an EHR is that it can be created, managed and consulted by authorized providers and staff across more than one health care organization. A single EHR can bring together information from current and past doctors, emergency facilities, school and workplace clinics, pharmacies, laboratories and medical imaging facilities.

Evidence of benefits of EHR adoption and other components of health information exchange (HIE) is mounting. Researchers at the Center for IT Leadership (2010) studied the U.S. Department of Veterans Affairs, an early adopter of HIE, and estimated that savings from preventing adverse drug events alone totaled $4.64 billion.[2]

There are more direct financial incentives driving EHR adoption as well. As of June 2015, more than 471,000 health care providers received payment for participating in the Medicare and Medicaid Electronic Health Record Incentive Programs, which authorize the Centers for Medicare & Medicaid Services to provide incentive payments to eligible professionals and hospitals that adopt, implement, upgrade or demonstrate meaningful use of certified EHR technology.

**Trend #3: Electronic patient portals**

Patient portals are more than a trend. They are must-have technology for hospitals and physicians. According to a Frost & Sullivan report, the value of the portal business is expected to reach nearly $900 million in 2017. Owned and operated by health care organizations, electronic patient portals comprise provider-tethered applications that allow patients to electronically access health information that is documented and managed by a health care institution. Using a portal, typically Web-based, institutions can offer a patient access to selected clinical data that is governed by the respective institutions as part of the patient's EHR. The patient can access clinical data, read and print it or integrate it into any electronic or paper-based type of patient-owned record.

Patient portals can also provide additional services and functions to the patients, ranging from medication refills and appointment scheduling to secure messaging between a patient and an institution – all with the potential to enhance patient satisfaction and the patient experience.

# INDEX OF ADVERTISERS

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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 17**

Despite continued media fragmentation, the proliferation of online formats has not eroded trust in traditional (offline) paid channels. TV, newspapers and magazines remain trusted advertising formats.

**page 35**

The most effective panels and communities will take into consideration the differences in device-oriented behaviors and use them as an advantage.

**page 53**

The two big data products we tested – a predictive model and a data enhancement service – performed quite differently from each other.

**page 58**

Generally speaking, B2B respondents are less likely to provide extremely positive or negative ratings on a survey scale.

## Quirk's 2016 Editorial Calendar

At Quirk's, we welcome submissions from outside sources but editorial space is limited. Interested in submitting an article? Review our 2016 editorial calendar and query early! Contact Quirk's Editor Joe Rydholm (joe@quirks.com) for more information.

| | |
|---|---|
| **January**<br>Internet/Online Research<br>Non-Conscious Data-Gathering (Internet of Things, Eye-Tracking, Biometric, Virtual Reality, Neuro MR, etc.) | **July**<br>Government/Public Agency Research<br>Mobile Research<br>Shopper Insights |
| **February**<br>Mobile Research<br>Millennials/Youth Research & Insights | **August**<br>New Product/Innovation Research<br>Location-Based Research |
| **March**<br>Advertising & Branding Research<br>Pharmaceutical Research | **September**<br>Research SourceBook Directory<br>Corporate Research Report<br>No Regular Editorial |
| **April**<br>Business-to-Business Research<br>Regional Focus: Emerging Markets | **October**<br>Customer Experience Research<br>Health Care Research |
| **May**<br>Working with Data – Data Integration, Storytelling & Reporting<br>Qualitative Research | **November**<br>Global Research<br>Research Panels and Communities |
| **June**<br>Research Technology Report<br>Internet/Online Research<br>Survey Design | **December**<br>Qualitative Research<br>Regional Focus: Asia |

## Coming in the December Quirk's

### ••• research in asia
Andy Zhao of GfK Northeast Asia looks at data privacy, smartphone penetration and other factors affecting marketing research in the APAC region.

### ••• qualitative research
Allison Rak explores using qualitative research to gather insights at trade shows.

### ••• qualitative research
20|20 Research's Jim Bryson offers a new approach to thinking about recruiting for qualitative research and suggests ways to get more out of the process.

# instantly™

3-17 Year Old
Mobile Gamers

Spanish-
speaking
Hispanic
Diabetics

African
American
Professionals

Moms Aged
25-40 with
Smartphones

IT Decision
Makers in the
Banking
Industry

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# **HARD-*to*-REACH**
# AUDIENCES

# SSI GETS GLOBAL.

**Since 1977, the I in SSI has stood for International**

We have the largest global footprint of anyone in our industry segment with offices in 21 countries and sample in over 100. Today, a significant and growing portion of our work is multi-country which we are uniquely able to handle, because we operate our proprietary panels and manage our projects on a single, integrated technology platform.

Our global scale and seamless operations, means that SSI can deliver high quality B2B and B2C product and services, with local expertise, consistency and speed all over the world. No one gets how to conduct global research better than SSI.

PEOPLE

GLOBAL — PANELS

TECHNOLOGY

SSI®

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