

Is social media research useless?

Maximizing survey response rates

How UX and MR can coexist

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## Marketing Research



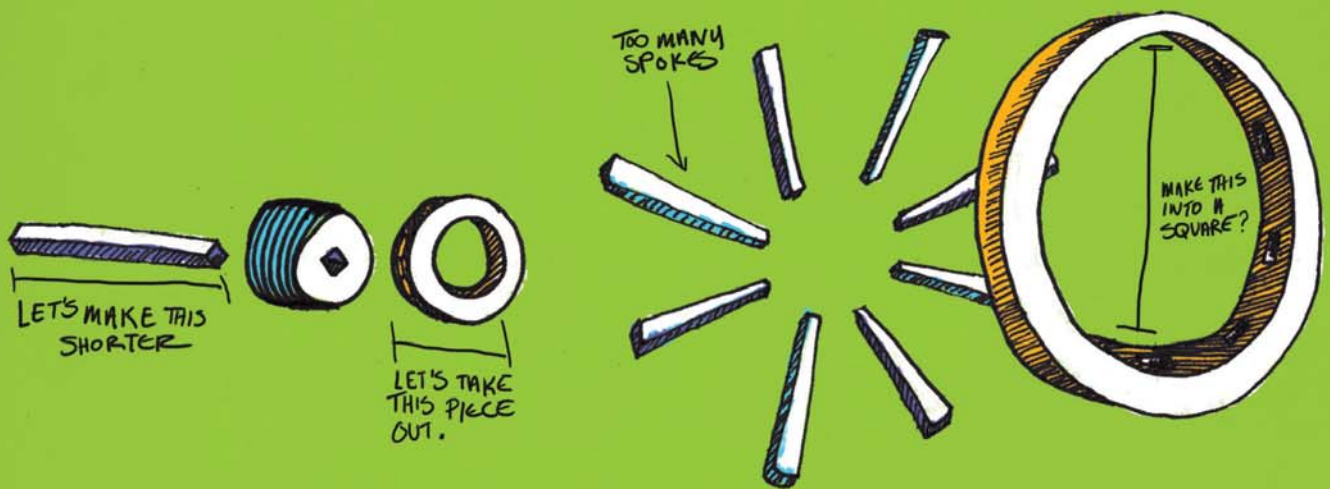
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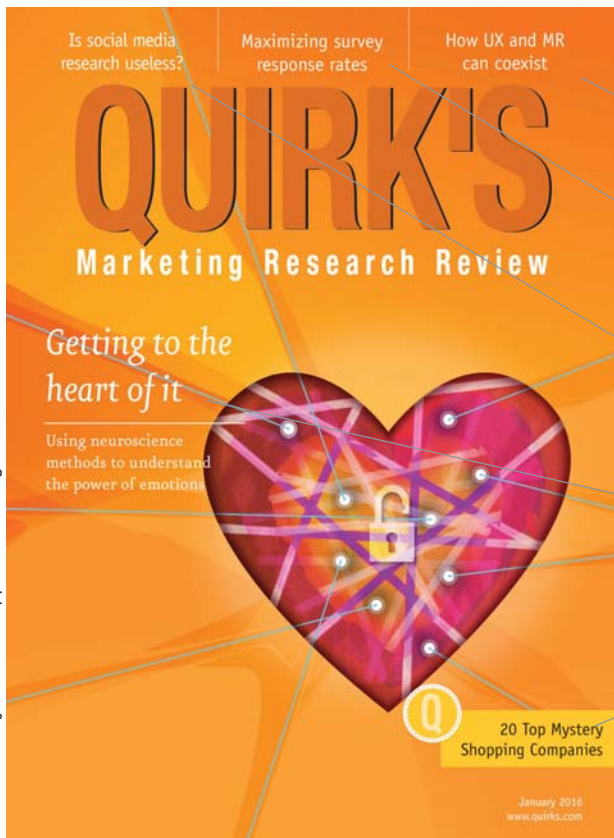
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... social media

## Quirk's on Twitter: in good standing and still growing!

The Quirk's Twitter account – @QuirksMR – has grown to more than 8,200 followers and we're aiming for more! We use our Twitter presence to connect with our audience and share our latest articles and blog posts and give live updates from the #QuirksEvent and the numerous other events we attend throughout the year. We hope our tweets provoke, engage and inform you in a way you can't find offline.

Most of all, we hope to see you use Twitter to share your thoughts and ideas so we can continue to make Quirk's more valuable to you. Follow us on Twitter at @QuirksMR.

... internet/web

## A new Quirk's Web site

With our growing national and international audience and the increased use of mobile, we decided it was time to rebuild Quirks.com from the ground up. After months of revisiting our old systems and usability standards, we've worked to implement new ideas and processes and are excited to launch a new and improved Quirk's Web site this spring! The new site will feature a more comprehensive site search with Amazon-like search suggestions. Subscriber accounts have also been revamped, making it easier for you to manage your Quirk's account profiles. In addition to the new site, Quirk's will be launching all new e-newsletter formats!



## // E-newsworthy

### Create brand evangelists by leveraging the customer life cycle

[quirks.com/articles/2015/20151126-2.aspx](http://quirks.com/articles/2015/20151126-2.aspx)

### Best practices for brands adapting to the omnichannel consumer decision journey

[quirks.com/articles/2015/20151225-1.aspx](http://quirks.com/articles/2015/20151225-1.aspx)

### Engaging digital Boomers, Gen X and Millennials: Generational differences don't always match stereotypes

[quirks.com/articles/2015/20151225-2.aspx](http://quirks.com/articles/2015/20151225-2.aspx)



## // Noted Posts

### QuirksBlog.com

#### Star Wars toys land in top toy lists for both boys and girls

[quirksblog.com/blog/2015/12/08](http://quirksblog.com/blog/2015/12/08)

#### Food trends we're craving in 2016

[quirksblog.com/blog/2015/11/04](http://quirksblog.com/blog/2015/11/04)

#### Final reflections on the 2015 QRCA annual conference

[quirksblog.com/blog/2015/10/14/](http://quirksblog.com/blog/2015/10/14/)

### ResearchIndustryVoices.com

#### How to conduct medical market research with children and young people

[researchindustryvoices.com/2015/12/04/](http://researchindustryvoices.com/2015/12/04/)

#### Simple e-mail alternatives to end communication frustrations

[researchindustryvoices.com/2015/12/03/](http://researchindustryvoices.com/2015/12/03/)

#### Sony Europe conducts consumer survey after launching new 4K TV

[researchindustryvoices.com/2015/12/02/](http://researchindustryvoices.com/2015/12/02/)

### ResearchCareersBlog.com

#### Taking a conscious approach to your hiring practices

[researchcareersblog.com/2015/11/24/](http://researchcareersblog.com/2015/11/24/)

#### Online training is the key to employee retention

[researchcareersblog.com/2015/11/20/](http://researchcareersblog.com/2015/11/20/)

#### Fear factory: Are you letting fear drive your leadership?

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# In Case You Missed It

news and notes on marketing and research



## ●●● financial services research

### Chip cards gaining ground, but slowly

Issuers have been converting to chip/EMV technology to thwart the ever-increasing occurrence of card fraud. But how do cardholders view the introduction of chip/EMV credit cards? Most see them as an improvement over their current card

usage, according to a survey by Synergistics Research entitled, *Chip Cards: The Consumer Perspective*.

Findings from the survey, based on 1,000 online interviews with consumers age 18 or older, show that more than three-quarters of credit card holders see chip/EMV credit cards as an



improvement over how they currently use credit cards. More than one-third see them as “very much” an improvement. This top-box perception tends to peak among those ages 35 to 64 and those with household income of \$75,000 to \$99,999. This perception is relatively unchanged from 2012, when eight in 10 indicated chip/EMV credit cards would be an improvement and close to half said “very much” an improvement. “Although consumers are positive toward chip cards, their viewpoint has not improved in the past few years. This suggests that further education and promotion continues

to be needed as providers issue the cards. As providers continue to issue and reissue cards with chips, the response by consumers will be even stronger,” says Genie M. Driskill, COO of Synergistics.

## ●●● travel and leisure research

### Travelers cite least-favorite airplane passenger types

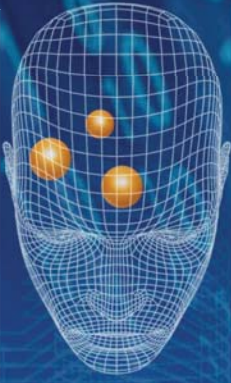
An airline etiquette study released by Expedia, Bellevue, Wash., asked Americans to rank the most frustrating behaviors exhibited by fellow passengers. “Rear seat kickers” topped the list of most aggravating co-passengers, with 61 percent of Americans citing them, followed by 59 percent who cited “inattentive parents” and 50 percent citing the “aromatic passenger” who exhibits poor hygiene or is in some other way giving off a strong scent. Three-quarters of Americans said “small talk is fine” but they prefer to keep to themselves most of the flight, though 16 percent said they use flights as an “opportunity to meet and talk to new people” – a subgroup whom 66 percent of Americans said they would “dread” sitting next to. Additionally, 32 percent of Americans said they would either prefer to have reclining seats banned entirely or at least restricted to set times during short-haul flights, though only 31 percent of Americans refuse to recline their own seats.



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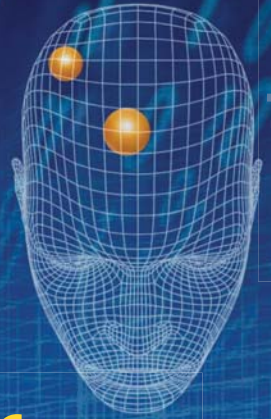
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# Some fresh (and not so fresh) ideas about presenting research findings

The start of a new year is a time for many to go in search of fresh ways of doing things, whether it's changing your diet or exercise routines to enhance your personal health or committing to stick to a budget to improve your financial well-being. The same goes for work. Looking to up your game or add some new wrinkles to how you present research findings and insights to your internal stakeholders? Drawing from the verbatims gathered during the fielding of our corporate researcher survey, which formed the basis of much of our annual Corporate Research Report, here is a look at some of ways respondents said they disseminate research data to their colleagues.

True, some of the approaches they cited are anything but fresh: PowerPoint decks, individual meetings, group gatherings, Webinars and seminars were all cited multiple times. (Hopefully their broad use is a testament to their effectiveness rather than corporate inertia!) But perhaps something below will spark an idea for a new approach, or a combination of approaches, that can help you enhance what you are already doing or take a whole new tack.

*"We have monthly breakfast meetings for the entire organization. Each month a few folks are selected to either talk about or present on a topic. Current market research is often one of the topics. These sessions are also recorded so that if you can't make it in person you will still be able to listen/view it."*

*"The best presentations are with the whole team (small to medium group) involved as they bring multiple perspectives to the results. Lots of good team dialog and thinking using this approach. We are trying to move towards putting all research on a company intranet including short videos of results."*

*"Increasingly we are trying a more workshop approach than a presentation. Also trying to plan when decision makers are at our local Starbucks and discuss with them or chat with those who influence them. Perhaps that's an ad hoc meeting but it feels more conversation, less meeting. We also sometimes have a speaker from an external company provide a case study that is parallel or a way to shake up thinking."*

*"More use of videos or anything visual – the medium may or may not be the message but it sure MAKES (or breaks) the message."*

*"Crisp two-minute summaries ... like a power page."*

*"We have customers present and talk about their experiences."*

*"We use Tableau. The senior team has access*



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Joe Rydholm can be reached at [joe@quirks.com](mailto:joe@quirks.com)

*to online dashboards and at this time reports are mostly delivered electronically to a wider audience. We have an online portal where some information is shared with stores."*

*"We will be creating virtual customer rooms for major customer types."*

*"We emphasize introducing groups to important research programs and results face-to-face and incorporating those colleagues in the problem-solution or improvement process. We invest a lot in our research/insights team members establishing relationships with 'client' groups and actively collaborating with them."*

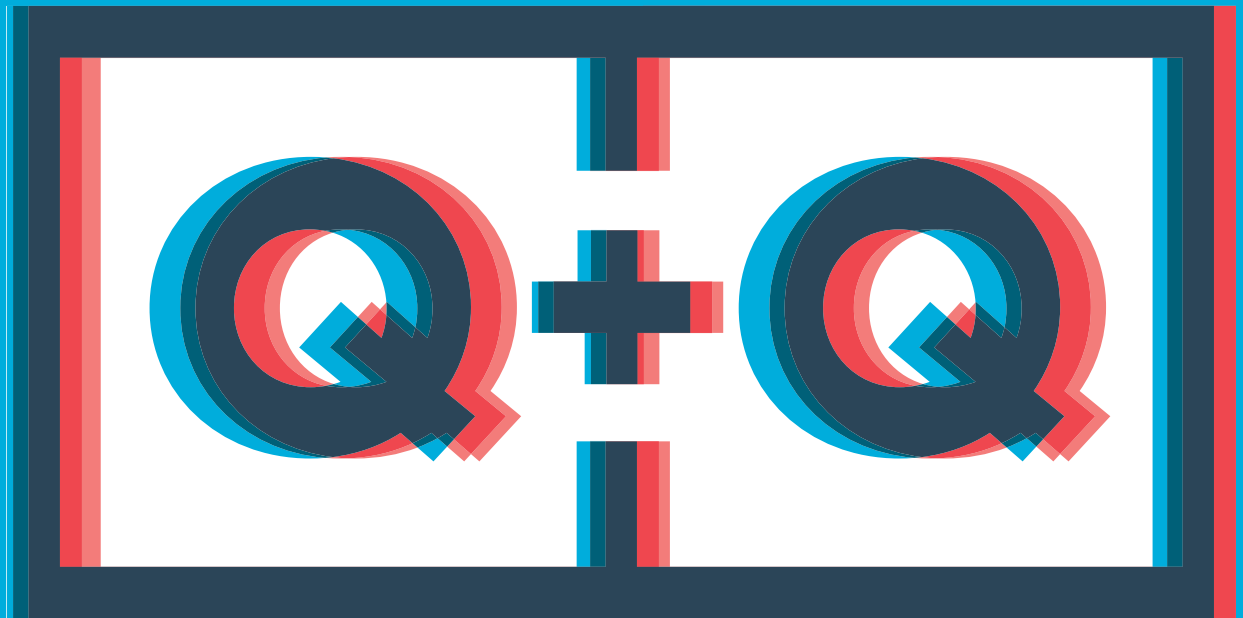
*"I attempt to get other groups to see the utility of information and insight to the point where they want to share it within their organization (with or without me)."*

*"SharePoint sites, in-house conferences and fairs, training sessions, internal courses."*

*"We have started creating short summaries for our ethnography studies – they want the results fast rather than in depth. We have also developed a dashboard for all of the quantitative metrics that we track for the organization (generally top-two box measures of sat, ease, recommend and advocacy, etc.)." ①*



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## // Survey Monitor



••• grocery research

### Center-stores doing just fine, thank you

Perimeters grow but centers still a factor

Despite what you may have read or heard, the center of the grocery store isn't dead. In fact, Nielsen research that analyzed center-store business trends across the U.S. suggests that the industry rumor mill is working overtime. While the perimeters of many retail stores are starting to account for larger sales, the center of store is still contributing to overall growth.

When we look at today's floor layout, the center of the store includes four key departments: grocery, frozen, dairy and alcohol. Comparatively, the

perimeter consists of bakery, produce, deli, meat and seafood. But here's the real insight: While many fear the center of the store is losing ground, it's actually digging in. For the 52 weeks ending Aug. 22, 2015, the center of store accounted for \$709.4 billion in sales across the U.S., up \$56.7 billion from 2011. What were the key growth categories? Grocery, dairy and frozen posted combined annual growth rate increases of 2.4 percent, 2.8 percent and 0.8 percent, respectively.

But those three key areas aren't the only places where sales are popping. We also see growth across a mix of indulgent products, as well as health and wellness-driven categories.

Salty snacks – which saw the biggest growth in sales last year –

are also near the top of the list of products requested by families (with children under 18), with 58 percent of parents being asked for salty treats, according to a Harris Poll survey. The appeal of salty snacks is seen across various family breakdowns (54 percent among those with 3-to-7-year-olds, 61 percent for those 8-12, 68 percent for those 13-17) and seemingly increases with age. Candy is also high on the list: among 56 percent of these parents, kids have made requests for the sweets. Retailers should be aware of shifting preferences over time, as reported requests for candy are heard mostly among parents with 3-to-7-year-olds (63 percent) and 8-12-year-olds (65 percent) in the household before dropping to 54 percent among the 13-17 set. Similar patterns emerge when it comes to cookies (64 percent among those with 3-to-7-year-olds, 68 percent 8-12 and 57 percent 13-17).

While many products in the center of store contribute to growth, some may be dragging it down. As healthier eating habits and increasingly hectic lifestyles takeover, the sales of some products in the center of the store are declining.

The most shocking revelation may be the decline of the cereal category, which narrowly beat out soft drinks as the category with the largest sales contraction. According to Nielsen Homescan data, 90 percent of American households – and 97 percent of those households with kids under 18 – buy at least one box of cereal in a year. Moreover, cereal buyers with kids purchase an average of nearly 28 boxes of cereal in a year (compared with roughly 17 among those without children). Given all this, perhaps it's not surprising that cereal is the item kids are most likely to have requested, with roughly seven



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in 10 parents (69 percent) saying their kids have asked for something in the cereal aisle.

With the center of store continuing to see growth, there are some instigators that manufacturers should be aware of that help drive finger-pointing on the shelves. Just over half of parents (53 percent) believe their children have been influenced at some point by something to do with a product's packaging, with 43 percent specifying characters on the packaging and 32 percent more broadly citing the packaging's appearance. Thirty-five percent cite something to do with the display, with 25 percent indicating a special store display and 18 percent more generally referring to the item's position on the store shelf.

Today's center of store is affected by numerous factors that are helping drive growth. Consumers are redefining how and when they eat and meal-times are no longer static occasions that take place mainly in the home. Additionally, children are increasingly making specific requests for food items to their parents. In order to help the center of store continue to succeed, retailers need to understand how to reach consumers in new locations with products that will better fit an increasingly diverse population with on-the-go lifestyles.

Retailers should also be aware of products' appeal to children, with 91 percent of parents recalling instances where their children made specific requests, and at the same time appealing to parents, as more than half (59 percent) recall instances they have had to say no. So while many believe the center of the store is in a depression, it's important to remember that the sky isn't falling, it's just not as sunny.

*For this study, a Harris Poll of 1,009 U.S. parents with at least one child under 18 in the household was surveyed online between Aug. 5 and Aug. 12, 2015, using the Harris Poll ParentQuery Omnibus.*



## ●●● the business of research Insights drive growth, study says

### Customer-centricity pays

**S**eventy-four percent of companies that over-perform on revenue growth create customer experiences based on data-driven insights, with only 30 percent of under-performing companies reporting the same, according to initial findings from Insights2020 – Driving Customer-Centric Growth, a global marketing leadership initiative. The study, led by Millward Brown Vermeer in partnership with the Advertising Research Foundation (ARF), ESOMAR, LinkedIn, Kantar and Korn Ferry, builds on the findings of Marketing2020 and is focused on aligning insights and analytics strategy, structure and capability to drive business growth.

Based on more than 325 in-depth interviews with senior marketing and insights leaders and 10,000+ interviews with practitioners across 60 markets, the Insights2020 initiative examines the drivers of customer-centricity and how being a customer-focused company impacts business performance. The research team analyzed over-performing and under-performing companies in terms of revenue growth to understand what over-performing organizations are doing differently to drive success.

“More than a set of activities, customer-centricity is a strategy to deliver business value against customer needs, guided

by brand purpose,” says Frank van den Driest, chief commercial officer, Millward Brown Vermeer and Insights2020 global program leader. “Building on the findings from Marketing2020, Insights2020 found that companies that outperform their peers on revenue growth do so by over-performing on key drivers of customer-centricity. With a robust and global sample, we are able to quantify the financial opportunity for any business and guide organizations on their journeys to customer-centricity. The connection is clear and it is time to elevate insights and analytics to the boardroom.”

The research revealed a number of striking differences between over- and under-performing organizations and all tie back to three key dimensions of customer-centric growth (“total experience,” “customer obsession” and “insights engine”):

- 83 percent of revenue growth over-performers link everything the company does to its brand purpose, as opposed to only 31 percent among revenue growth under-performers.
- 62 percent of over-performers leverage insights and analytics to drive consistency across all customer touchpoints; only 26 percent of under-performers do.
- In 78 percent of over-performing companies, customer-centricity is fully embraced by all functions whereas this is only true in 12 percent of the under-performing companies.
- 66 percent of all over-performers are working to link their disparate data sources, compared with only 33 percent of under-performing companies doing so.
- The insights and analytics function reports straight into the CEO in 33 percent of over-performer companies; this is true for only 13 percent of the under-performers.

Phase two of Insights2020, available in early 2016, will build on the key drivers of customer-centric growth and will explore the roadmap for helping brands reach customer-centricity. For more information visit [www.insights2020.org](http://www.insights2020.org).





## ●●● shopper insights Consumers say corporate ethics matter

### Skepticism still prevalent

Ethics have become increasingly important to a company's reputation at a time when public opinion can go viral in an instant. New research from Mintel reveals that 56 percent of U.S. consumers stop buying from companies they believe are unethical. What's more, over one-third (35 percent) of consumers stop buying from brands they perceive as unethical even if there is no substitute available and 27 percent stop purchasing even if they think the competitor offers lower quality. Overall, more than three in five consumers feel that ethical issues are becoming more important (63 percent).

Some 34 percent of consumers tell others when they perceive a brand to be making ethical actions or actions that are honest, fair and responsible, while another 29 percent of consumers take to social media to share their support of ethical companies. However, the likelihood to stop buying from "bad" brands is not met by the likelihood to support "good" brands, with just 45 percent of consumers buying products from compa-

nies they perceive as ethical. Despite 58 percent of consumers agreeing that buying ethically-produced products makes them feel good, there is skepticism toward company ethics. Half of Americans agree that marketing products as "ethical" is just a way for companies to manipulate consumers (52 percent) and that many companies behave ethically in one area while behaving unethically in another (49 percent). Additionally, one-third of consumers report that a company's ethics rarely or never influence whether they purchase the company's products (31 percent).

Many brands are using ethical icons and terms on product packaging to communicate ethical practices but Mintel research shows that this method leads to confusion among consumers. Some 68 percent of Americans are confused about what certain ethical icons mean, with nearly half (46 percent) confused about the meaning of certain ethical terms. For example, despite Halal being the most recognizable icon, just 20 percent of consumers report that they know what it means. What's more, only 10 percent of consumers know what the icons for Fair Trade USA and Cruelty Free International mean.

"When corporate social responsibility went mainstream in the early 2000s, incorporating social initiatives and linking to ethics was an effective way to attract attention and promote brand loyalty. Now, with more than half of consumers willing to stop supporting unethical companies, it's become the norm and is often expected by consumers. These efforts are no longer differentiators and can even draw skepticism among consumers," says Lauren Bonetto, lifestyles and leisure analyst at Mintel. "Brands have attempted to boost their ethical reputations by using icons but these are only effective for reaching the most engaged consumers. Brands must consider alternative methods to showcase their ethical efforts, such as content marketing showing the full scope of a

brand's actions and participating in related grassroots efforts."

As described in Mintel's North America 2016 Consumer Trends, following the global financial crisis, consumers exchanged the "bigger is better" mantra for right-sized purchases and supporting small businesses, which led to an explosion in craft products and increased interest about a product or brand's origins. One way big brands are trying to appeal to these consumers is by entering the craft and niche markets and by sharing genuine stories about the brand to form relationships with consumers and give them the security that the brand's products are worthy of their investment and loyalty.

More than two-thirds (70 percent) of Americans are at least sometimes influenced to purchase products based on a company's ethics and, according to Mintel research, a company's size stands to help or hurt its ethical image due to consumer notions about the relationship between size and ethical behavior. Half of consumers say they trust small companies to do the right thing (49 percent), while big businesses (36 percent) are much less likely to be trusted. The most commonly considered factor when determining a company's ethics is employee treatment (48 percent), followed by where its products are made (34 percent) and if the brand or product is environmentally-friendly (33 percent). Consumers are more likely to consider outreach in local communities (22 percent) over national (18 percent) or global (13 percent) outreach.

"Consumer attitudes toward big businesses have shifted, with many wondering if a company's success is coming at the expense of others. While often popular for their lower prices and brand recognition, big companies may be criticized for the treatment of their employees and product sourcing. Companies can combat these concerns by launching regional brands, working with local suppliers and being proactive with community outreach," says Bonetto.



entertainment research  
**Netflix users double their viewing**

Mobile on the rise too

Regular (monthly) Netflix users in the U.S. have grown even more dependent on the service for viewing TV programming, saying they watch 10 shows per week via the platform – as well as four movies during the same time frame. For TV content, this represents a doubling of the level (five shows per week) found in the same survey three years ago.

Projected to the full population, this means that the average U.S. consumer ages 13 to 54 watches roughly five TV shows and two movies per week via Netflix using one or more platforms.

The findings come from “Over the Top TV 2015: A Complete Video Landscape,” a study in GfK’s ongoing the Home Technology Monitor series that tracks media technology and services. The new report includes trends from five prior over-the-top (OTT) studies conducted since 2010.

Watching via Netflix on mobile devices has also more than doubled in three years, with 24 percent of regular Netflix users reporting viewing in the past month via one or more mobile platforms, up from 10 percent three years ago. Monthly viewing on TVs has risen from 36 percent to 47 percent among the same group and watching on PCs (laptop or desktop) has jumped from 17 percent to 25 percent.

One-quarter (25 percent) of regular Netflix users also report binge viewing – defined here as watching three or more programs in one sitting – either “often”

or “all the time.” Bingeing levels are highest among Generation Y (ages 13 to 35), with almost one in three (31 percent) reporting this behavior.

“Netflix is a TV ecosystem unto itself and now an established force in the total TV marketplace,” says David Tice, senior vice president of media and entertainment at GfK. “But it represents just one aspect of an increasingly complex OTT picture, which also includes subscription services like Amazon Prime and Hulu, delivery systems such as Roku and Apple TV and threatened incumbents like cable and satellite companies, which are trying to leverage their content with ‘TV Everywhere’ options. The upshot is that OTT has now gone mainstream and consumer expectations of control over their viewing experience continue to rise. When today’s teens become breadwinners, they may bypass traditional distribution channels in ways we cannot even imagine now – challenging all of today’s content players to stay up to speed and continue to experiment with delivery innovations.”



youth research  
**‘Just 5 more minutes’**

Study looks at global parents’ bedtime battles

Parents – across the U.S., U.K., France, Canada, Australia, Brazil and Mexico – who are in charge of getting their children tucked in at night say that it takes an average of 17.5 minutes each night trying to get their children to bed, according to a study conducted by Ipsos Public Affairs on behalf of Netflix. Getting

their kids to bed can be a challenge for many, with six in 10 reporting that their children have come up with some creative stall tactics to try and delay bedtime (61 percent). Further, nearly eight in 10 (79 percent) saying that they sometimes make compromises with their children to get them to go to bed, with the most common negotiating tactic being giving their children five more minutes of whatever it is they are doing (38 percent).

While about four in 10 parents of children ages 2 to 10 say that they typically can get their child tucked into bed in 10 minutes or less, including 16 percent who spend less than five minutes getting their child into bed, and another 24 percent who say they can typically accomplish this in about six to 10 minutes, for many parents it is a longer process. Nearly three in 10 (27 percent) spend about 11-20 minutes on bedtime routines, with another one in five (20 percent) saying that it usually takes them between 21-30 minutes to get their child into bed. Nearly one in 10 (8 percent) say it takes up to 45 minutes and another 5 percent say it takes even longer than that.

Parents living in France typically spend significantly less time trying to get their children into bed compared to those in all other markets, with bedtime averaging 12.3 minutes. Respondents from Australia, averaging a bedtime of 16.5 minutes, are also among those most likely to spend the least amount of time getting their children into bed.

When thinking about how many nights over the course of an average week their children go to bed on time, parents across markets say that their children go to bed on time 69 percent of the time, or 4.8 days a week, on average. This includes more than a third who say that their children go to bed on time five nights a week (36 percent) and another one in seven each who say their kids go to bed on time six (15 percent) or even seven (15 percent) nights a week. While at least one in 10 manage to accomplish getting their kids tucked in on time three (10 percent) or four (17 percent) nights a week, very few parents say that their children go to bed on time only once (3

percent) or twice (5 percent) a week.

Respondents from France spend the least amount of time putting their kids to bed and are also significantly more likely than parents in all other markets to say that their children go to bed on time (average of 5.1 nights a week). Parents from Mexico (4.9), the U.K. (4.8) and Canada (4.8) also fare rather well here, on par with the global average.

More than six in 10 parents say that their children have come up with some creative stall tactics to try and delay bedtime (61 percent) – although this is especially true among parents living in the U.S. (66 percent), Mexico (65 percent) and the U.K. (64 percent). In addition, more than two in five parents further agree that their kids' stall tactics frequently work to delay their bedtimes (44 percent) and that these tactics can be too cute or so clever that parents give in and let their kids stay up past their bedtimes (41 percent).

Brazilian parents (52 percent), and to a lesser extent American parents (49 percent), are among those most likely to say that their child's stall tactics frequently work to delay bedtime.

Parents living in Mexico, in their turn, are significantly more likely to say that they give in and allow their children to stay up past their bedtime thanks to the cute and clever tactics their children use (60 percent), while those in Brazil (44 percent), the U.K. (42 percent) and the U.S. (41 percent) follow here, though at a distance.

Those in France are significantly less likely than those from all other markets to agree that their kids' stall tactics frequently work to delay their bedtime (29 percent) and that these tactics are so cute/ clever that they give in and let their children stay up (29 percent).

The most common age cited for when children begin to display bedtime stall tactics across markets is between 3 (23 percent) and 4 (20 percent) years old – although a similar proportion of parents say that their child's stall tactics started as early as 2 (18 percent) or not until 5 years old (14 percent). In comparison, stall tactics performed by 1-year-olds are

not as common, with only 7 percent of parents saying that this is the age around which their child first began to exhibit such behavior. Similarly, parents are not as likely to say that their children didn't start using bedtime stall tactics until they were ages 6 (8 percent) or older (10 percent; ages 7-10). When it comes to different styles of stall tactics, the "just five more minutes" negotiator (42 percent) and the "super-starved or soooo thirsty" routine (41 percent) are most commonly witnessed by parents across markets; while roughly a third each say that their children try to stall by using flattery ("I love you mom/dad!") (33 percent) or by acting as slow as snails (31 percent). One in six parents say that their children try to be clever tricksters (18 percent) or act forever forgetful (15 percent). One in 10 parents mention some other stall tactic (8 percent), while a slightly greater proportion say that none of these is closest to the stall tactic style of their child (12 percent).

Roughly a third of all parents say that after trying everything else, they sometimes have to trick their kids to get them into bed (35 percent) – although this is especially true among parents living in Mexico (45 percent), Brazil (39 percent) and the U.S. (38 percent). Meanwhile, a slightly smaller proportion admit – though reluctantly so – that one of the quickest ways to get their kid into bed is a bribe (28 percent), with respondents from the U.S., the U.K. and Mexico all standing out this time as those most likely to agree here (33 percent in each market).

In fact, nearly eight in 10 (79 percent) say that they sometimes make compromises with their children to get them to go to bed – and giving children five more minutes of whatever it is they are doing (38 percent) is the most common negotiating strategy among all parents. Three in 10 promise their children a fun activity the next day (30 percent) or the chance to stay up later on the weekends (29 percent), while one in five get their children to go to bed by letting them watch part of a TV show (19 percent), get food/eat a snack (18 percent) or watch one more full TV show (16 percent).

Parents are not as likely to say they'll do whatever it takes (7 percent) to get their children to go to bed, although nearly one in 10 negotiate in this manner, while very few use money (4 percent) or something else (5 percent) to help get their kids to go to bed. One out of every five (21 percent) parents say that they never make compromises to get their child to go to bed – especially those from France (33 percent), and to a lesser extent parents from Australia (26 percent).

The time and effort taken to put children to bed is well worth it for parents, with nearly nine in 10 across markets agreeing that the last snuggle, once their child is quietly tucked into bed, is one of the most special parts of their day (87 percent). However, more than half of all parents nevertheless admit that getting their child to bed on time can be a struggle (51 percent), and even more wish they had a way to make it easier to get their children to bed (56 percent).

While respondents in the U.S. are significantly more likely to admit that getting their child into bed on time can be a struggle compared to those in other markets (61 percent), those in Mexico stand out as being significantly more likely to wish they had a way to make it easier to get their children into bed (74 percent).

*These are findings from an Ipsos poll conducted on behalf of Netflix, fielded September 2-23, 2015. For the survey, a sample of 7,277 adults between the ages 18 and over living in one of the U.S., U.K., France, Canada, Australia, Brazil or Mexico, was interviewed online, including 7,087 respondents who say that they are the primary parent responsible for getting their child tucked into bed at night at least some of the time (approximately 1,000 parents in each country). The precision of the Reuters/Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 1.3 percentage points for all parents. The data were weighted to the U.S. current population data by gender and age based on Census data. Statistical margins of error are not applicable to online polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding.*



# Q

## IN FOCUS

### Product and Service Update

●●● segmentation research

### NPD service integrates segmentation and sales data

#### Who is buying what

The NPD Group, a Port Washington, N.Y., research firm, has introduced a new analytic service that integrates clients' consumer segmentation schemes with the sales and market share "data of record" in every industry and country in which NPD offers survey-based consumer tracking services. The new service will enable clients to view industry sales and market share at the category and brand level for each of their consumer segments. By revealing who is buying, what they are buying, where they are buying and more, the service is designed to enhance the value of segmentation as a basis for guiding decision-making across multiple functions including marketing, sales, insights and product development.

[www.npd.com](http://www.npd.com)



[quirks.com/articles/2016/20160104.aspx](http://quirks.com/articles/2016/20160104.aspx)

●●● brand research

### Model measures brand-related emotion

#### Uses structural equation modeling

Westport, Conn., research firm Praxis Research Partners and New York brand intimacy agency MBLM have developed the Brand Intimacy Model, which



is used to measure brands based on emotion. The approach uses structural equation modeling to define a brand's strength largely upon the emotional connections between the brand and its users. It also provides a snapshot of a brand's current intimacy profile (its Brand Intimacy Quotient), the extent to which its users are emotionally invested in the brand and an understanding of what drives intimacy across six emotional dimensions (archetypes).

[www.praxis-research.com](http://www.praxis-research.com)

●●● packaging research

### Online tool seeks rational, emotional reactions to packaging

#### A virtual shopping display

London-based insight and research Agency Vision One has launched PackProbe, an online survey tool that evaluates package designs by taking consumers through a series of tasks to investigate rational and emotional reactions to various components of the pack design. The range of tests includes simulating purchasing decisions using a virtual 2-D/3-D shopping display where respondents can interact with products and are designed to mimic the way people shop, taking into account how people use peripheral vision. These insights are used by brand owners to develop on-shelf designs which appeal to people's peripheral vision.

[www.visionone.co.uk](http://www.visionone.co.uk)

●●● online qualitative

### Free collage tool from 20|20 Research

#### Engage participants, enhance reports

Nashville, Tenn., firm 20|20 Research has launched an online research collage tool, QualLage, designed to make it easier for researchers to prepare and engage qualitative research participants while yielding a report enhancement to help researchers communicate a study to clients and marketers. QualLage will be available in two packages, a basic tool free to any researcher for use in-person or with any online platform and a premium version with enhancements that will be available to 20|20 Research clients.

[www.2020research.com](http://www.2020research.com)

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[www.NationOfNumbers.com](http://www.NationOfNumbers.com)



●●● social media

## Facebook marketing tools go local

### Updates to local awareness ads, local insights

Facebook has launched two new tools for local marketing that enable businesses with multiple locations to create local ads for each store and give more insight into the groups of people near their stores. One of the new tools includes updates to local awareness ads, which allow businesses to use information from each of their Pages to add ad copy, links and call-to-action buttons to their ads so each ad is localized for its corresponding store. It also offers ad reports for each location to give insight into ad performance. The second tool, local insights, supplies businesses with the aggregate demographics (including gender, age, tourist and local residents) and trends associated with people nearby and shows the busiest days of the week and times of day. It also allows advertisers to see the percentage of people nearby who have seen their ad, showing them how well their ads are reaching potential customers.

●●● Briefly

■ New York-based research and market intelligence firm SIS International Research has launched SIS Big Data Solutions, a platform that combines consumer attitudes with behavioral data to guide client decision-making with big data solutions. The platform is now available in the U.S., Singapore, Manila and China. The firm will continue to expand to other markets in 2016 and beyond.  
[www.sisinternational.com](http://www.sisinternational.com)

■ San Francisco-based predictive personalization platform Boomtrain has partnered with San Mateo, Calif., marketing software firm Marketo to offer a solution that analyzes how users interact with a brand's content and products by integrating Boomtrain's learning algorithms with Marketo's automated campaign delivery and their own first-party data. As a result, marketers can recommend relevant content and products and put those recommendations directly into their e-mail and on-site campaigns to drive engagement metrics.  
[www.marketo.com](http://www.marketo.com)

■ India-based survey research solution firm Global Survey has released a SaaS-based solution that offers client management, panel vendor management, project management with pre-screeners with quotas, managed redirection and online panel recruitment.  
<http://globalsurvey.in>

■ SIM Partners, a location-based marketing technology firm in Chicago, has launched Velocity Insights, a suite of features available from its local marketing automation platform Velocity that provides analysis to help enterprise marketers improve the effectiveness of their local marketing efforts. It aims to provide a better understanding of the effectiveness of a brand's local marketing strategy, ranging from the visibility and performance of its location pages to the health of its business listings. It measures listing health by applying a proprietary scoring algorithm that assesses factors like location data accuracy and reach across the most influential data publishers and aggregators.  
[www.simpartners.com](http://www.simpartners.com)

■ Mountain View, Calif., social media analytics company NetBase is one of two launch partners selected to bring Twitter's audience application programming interface (API) to market. The Audience API allows NetBase to provide brands and agencies with

insight into consumer behaviors and drivers to better inform marketing strategies and connects NetBase to Twitter's audience demographic, media consumption, device usage and psychographic models and gives insight into consumers, while still protecting their privacy. NetBase's patented language analytics technology leverages the API data to discover people's interests, behaviors and purchase intent. With this insight, brands and agencies gain a view of their audiences to drive relevant and targeted content accordingly.  
[www.netbase.com](http://www.netbase.com)

■ London-based brand strategy and research agency BrainJuicer has released BrainJuicer Brand Tracking, a System 1 methodology that measures fame (how readily a brand comes to mind in the category), feeling (how strongly people feel about a brand) and fluency (how easily people recognize a brand) to provide a one-to-five-star rating of the current strength of the brands in any category and predict which are likely to be growing and declining a year from now.  
[www.brainjuicer.com](http://www.brainjuicer.com)

■ Boston-based market intelligence firm InCrowd has linked its on-demand solution with New York firm SHC Universal's Global Healthcare Gateway Access Platform, allowing health care firms to access insights faster and from a broader range of health care professionals, providers and patients for making business decisions.  
[www.incrowdnow.com](http://www.incrowdnow.com)

■ Voxter, a new qualitative research tool, has been launched in London by founding directors Ronny Razin and Piers Aitman. Voxter can be used for market research, opinion polling, brand engagement, change management and crowdsourcing, among other applications.  
[www.voxter.co.uk](http://www.voxter.co.uk)

■ Eclinical Solutions LLC, a

Mansfield, Mass., data management services and technologies provider, has released the latest version of its end-to-end clinical data repository and analytics platform, illuminate, which provides business intelligence capabilities to support risk-based monitoring, enhanced capabilities to organize data for reporting and analysis and visualizations for safety signal detection and analysis. [www.eclinicalsol.com](http://www.eclinicalsol.com)

■ New Orleans-based software company Lucid has launched Proof, a digital marketing measurement tool that uses consumer data to create visibility into audiences reached and impact created by media campaigns. Proof brings together measurement of audience exposure and reaction across mobile and non-mobile platforms and allows media buyers, brands, analysts and

researchers to gain a picture of audience and campaign impact. <https://luc.id>

■ Online survey research firm Princeton National Surveys, an affiliate of Pennington, N.J.-based research firm G&R, has introduced a new coding service which provides interpretation of raw text recorded by people about brands, companies, values and messages in polls, customer feedback, social media discussion and other streams of open-ended written commentary. <http://princetonnationalsurveys.com>

■ In the U.K., eBay has introduced two new audience segments for marketers, “sales shoppers” and “premium shoppers,” allowing brands to target shoppers in a more personalized way using behavioral insights.

It also allows brands to engage with specific consumer types, with early additions including parents. Using search and purchase insights, eBay segments shoppers into five stages of early parenthood: expectant parents, new parents, tiny tot parents (those with children up to 2 years old), toddler parents (with 2- and 3-year-old children) and pre-school parents (those with children ages 4 and up). While the segments are mainly targeted around sales shoppers throughout the holiday season, eBay hopes to introduce more targeted segments in 2016.

The advertisement features a teal background. On the left, two smartphones are shown. The black Samsung phone displays a survey results screen with 'Current Points See all earnings', a progress bar, and a table with columns for 'APPROVED' (365) and 'PENDING' (0), totaling 365. Below this, it shows a 'Recent Payouts' section with 'Teta M cashed out \$10' and a 'Check out Survey Street, Scott!' notification. The white iPhone displays a 'Daily Poll' for 5 points asking 'Did you take a vacation this summer?' with radio button options for 'Yes', 'No!', and 'Summer ain't over yet'. Below the poll are '23 Comments' from users like 'Bobbie P' and 'doreenw'. In the top right corner, a pink circle contains the text 'Research made social'. To the right of the phones, the text reads 'Relevant research requires solutions that engage the modern world'. Below this, it states 'BRINC and its online community, MintVine™, are leveraged by social interaction — creating panel communities that are actively engaged and in constant dialogue.' The MintVine logo is at the bottom right of the ad area.

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# Using elasticity modeling to test retail pricing

| By Mike Grigsby

## snapshot

The author reports on findings from a specialty retailer's four price-related field tests.

**R**etailers send out too many discounts. They give away too much margin. They know this but they do not know what to do about it. They have no way to analytically ascertain who is sensitive to price and really does need a discount and who is not or whether price sensitivity is differentiated by product categories or by time period.

The general approaches to pricing (for an existing product) are from marketing research and tend to be survey-based. The insights gained from those instruments are self-reported and seem self-serving. If behavior from a transactional database can be collected (actual purchases responding to actual price changes) then elasticity modeling can be carried out. This modeling will calculate price sensitivity (by product by time period) and strategic insights can be given in terms of maximizing net revenue.

As part of a test, this transactional data was collected for a specialty retailer and elasticity-modeling was performed. Price sensitivity was estimated by major product categories by quarter. Knowing this, a marketer could increase or decrease the price of these categories to take advantage of different sensitivities by quarter in order to maximize net profit.

An in-store field test was set up, in three increasingly wider designs. The results of the first showed products in the test stores was higher than the net revenue of the same products in the control stores by over 22

percent. The second design had test products outperforming control products by 14 percent and the last design had test products outperforming control products by 9 percent.

As mentioned, the client in question is a specialty retailer with over \$1 billion in annual revenue, over 1,000 stores and over 10,000 employees. The previous year this retailer had a difference between gross and net revenue of about 26 percent. Since its products were non-discretionary – nearly hedonistic – requiring a deep discount in order to purchase seemed unlikely.

Generally, discounts were not differentiated. As in most retail organizations, merchandisers rule the world. Merchandisers buy products and forecast when they'll have stock-outs. They do not want inventory on hand. So the level of (in-store) discounts and markdowns is all about making the stock-out meet the forecast, either at the month or quarterly end. Marketing communications (including offering coupons) is about getting customers into the store.

Therefore, the firm wanted a way to maximize the probability of purchase while minimizing the amount of margin given away. This required targeting. While not personalized at the customer level (yet), this stage was about finding out which products were more/less sensitive and when. That is, does Product X tend to be more sensitive to price in Q3 as opposed to Q1? If the answers to any of those questions are yes then a discounting (optimizing) strategy can be implemented.



[quirks.com/articles/2016/20160105.aspx](http://quirks.com/articles/2016/20160105.aspx)



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### Four approaches to pricing

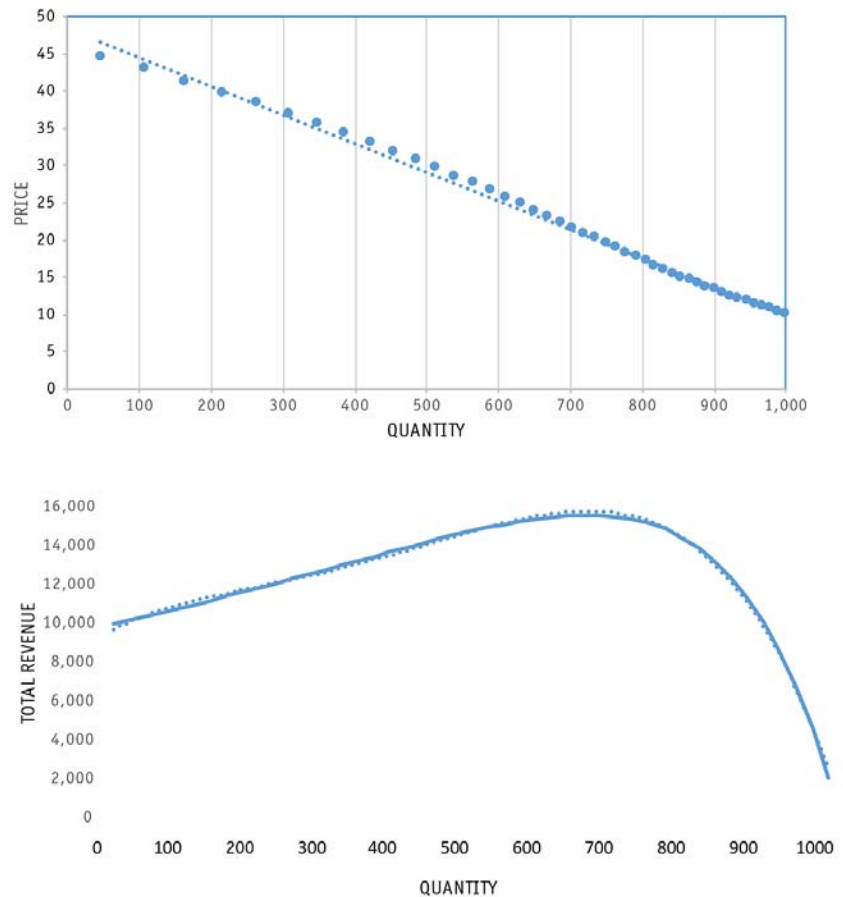
Generally, there are four approaches to pricing. The first three of these are based on marketing research and use a survey method to generate the data. A primary research survey can be designed and administered. But this is, as are all survey-based tools, self-reported and self-serving. The second common approach is the Van Westendorp pricing analysis system. This survey generates two graphs: the percent of respondents who say the product in question is priced so high they would not buy and the percent of respondents who say the price is so cheap they would not buy. The intersection of these two lines is purported to be “optimal price.” Thirdly is conjoint. While this is about choices (considered jointly) it is not consumers choosing in a real economic environment. It is artificial and/or contrived.

The last approach is elasticity modeling. This data comes from a transactional database. This is real consumers responding to a real choice in a real economic environment. All of the swirling issues of competitive pressure and advertising awareness and satisfaction and loyalty, etc., are bundled together in that purchasing-related decision. This will give an accurate measure of price sensitivity.

### Discount too much

Elasticity modeling is of utmost importance, especially in retail in-

Figure 1



dustries. Retailers typically discount too much (and they know it) but they have no real way to target or test or understand (quantitatively) how to wean themselves off the drug. It is clear some customers do need a (deep) discount in order to maximize probability to purchase and it is also

usually the case other customers (particularly for some product categories and/or at some times of the year) do NOT need a (deep) discount in order to purchase. It is the task of marketing analytics to understand and exploit this sensitivity to price.

That's why, for an existing prod-

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uct, if a database is available that tracks customers' actual purchases and responses to actual marketing communications and merchandisers' markdowns offering actual changes in price, elasticity analysis is the only real solution. And it is actually cool.

Elasticity, as such, is an unfortunate term. It's a little awkward, cumbersome and not exactly even accurate. The right word is "sensitivity." The concept is a measure of how sensitive is an output variable (typically units) to a change in some input variable (and in this case that'll be price). That is, given a percent change in price what is the resultant percent change in units?

We like the idea of elasticity because it is what mathematicians call a pure number: It is without dimension or scale. This is because elasticity is a marginal function over an average function.

There are two kinds of elasticity: elastic and inelastic; that is, sensitive and insensitive. When price changes by X percent and units change by greater than X percent, we say units are sensitive to price. When price changes by X percent and units change by less than X percent, we call this insensitive to price. Note that the relationship between units and price is always inverse, that is, negative. When price goes up units will go down. That is the only law in all of economics, the law of demand. Because it is always calculated as negative we usually ignore the sign. That is, we always take the absolute value. If the elasticity is < 1.00 we call it inelastic and if it is > 1.00 we call it elastic.

While price has an impact on units, the real magic of elasticity is the effect on total revenue. Note that total revenue = price \* units. In an inelastic demand curve total revenue follows price. That means if you want to increase total revenue you must increase price. In an elastic demand curve, total revenue follows units. If you want to increase total revenue you must decrease price. By price

I mean (and will always mean) net price; that is, after discounts.

Note Figure 1. The top graph is the typical price-unit demand curve. It displays the inverse relationship as expected. Price is on the vertical axis and units is on the horizontal axis. The bottom graph shows units and total revenue. Note that at the higher end of the units axis total revenue can only increase if there is a price increase. That part of the demand curve is inelastic. The opposite is true at the lower end of units which have the higher end of prices. In order to increase total revenue price must be decreased. That is the elastic portion of the demand curve.

### From mathematical to statistical

To understand how modelling elasticity works, it's important to go from the mathematical to the statistical definition. When first exposed to elasticity the simple idea was demonstrated with point elasticity, that is, the elasticity between two points.

$$\frac{\frac{(Q2 - Q1)}{Q1}}{\frac{(P2 - P1)}{P1}} =$$

After point elasticity we are next exposed to arc elasticity, the elasticity of a larger part of the demand curve.

$$\frac{\frac{(Q2 - Q1)}{Q1}}{\frac{(P2 - P1)}{P1}} = \frac{\frac{\Delta Q}{Q}}{\frac{\Delta P}{P}} =$$

That is, differences in the two points from quantity, mathematically becomes the change in quantity and the difference in the two points from price mathematically become the change in price. This change in Q over Q divided by change in price over P is the arc.

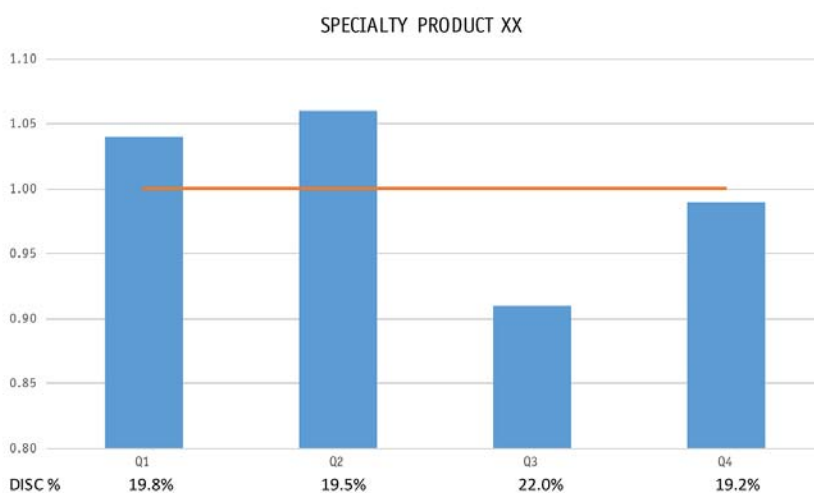
$$\frac{\frac{(Q2 - Q1)}{Q1}}{\frac{(P2 - P1)}{P1}} = \frac{\frac{\Delta Q}{Q}}{\frac{\Delta P}{P}} = \frac{dQ}{dP} \frac{P}{Q} =$$

Now comes the fun part. Change in Q over change in P is the marginal function. How Q changes as P changes shows an average slope of the whole (demand) function. This average slope in mathematics is called the derivative of Q with respect to P. So mathematically, elasticity is the marginal function over an average function, or the derivative of Q with respect to P multiplied by average P over average Q. Here comes the kicker.

$$\frac{dQ}{dP} \frac{P}{Q} = B_{price} \frac{\bar{P}}{\bar{Q}}$$

The average slope in mathematics is called the derivative and it is measured without error, all points on the function exactly equate to

Figure 2



HIGH QUALITY, LOW COST

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SURVEY  
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MILLIONS OF PANELISTS  
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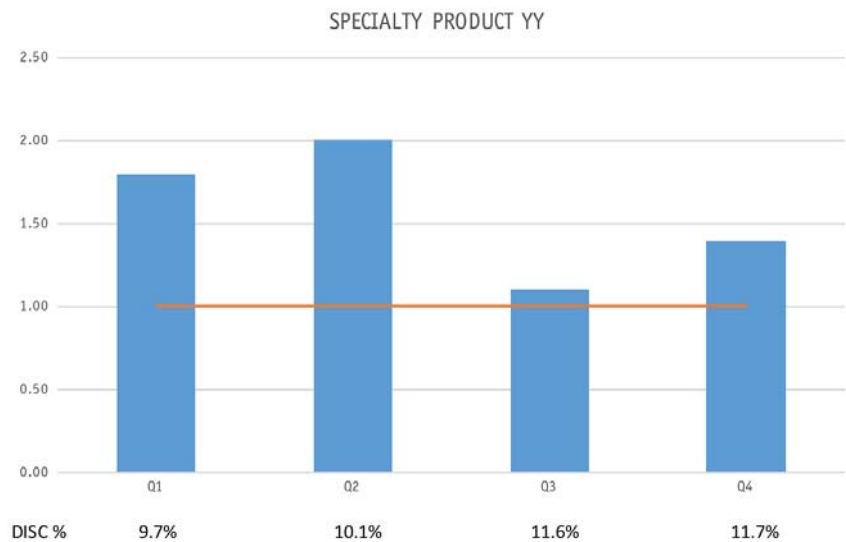
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Figure 3



the function. In statistics the function is not measured without error but includes a random error term,  $e$ . But the concept of average slope in ordinary regression is called the coefficient. So the coefficient in statistics is analogous to the derivative in mathematics. In a demand model where quantity is the dependent variable and price is the independent variable, to calculate elasticity requires multiplying the coefficient of price by average price over average quantity. Voila!

### Very insensitive to price

So elasticity modeling was done by product category by quarter. The chart in Figure 2 shows two such (extreme) results. Product category XX is shown as very insensitive to price. Below the chart is detailed the average discount rate for this product at that quarter. This product has the highest average discount rate even though it is the least sensitive to price. This is exactly the wrong strategy! The customers who buy Product XX are NOT sensitive to price yet they get the largest discount. (Note that they will take the discount, they just do not need the discount.) A discount of a few percentage points lower can save millions of dollars in margin. Even if this product is used as a loss-leader and a large discount is given as a “starter basket,” etc., the discount is probably far too high. The recommendation would be to test decreasing discounts, lower and

lower, until it makes a difference.

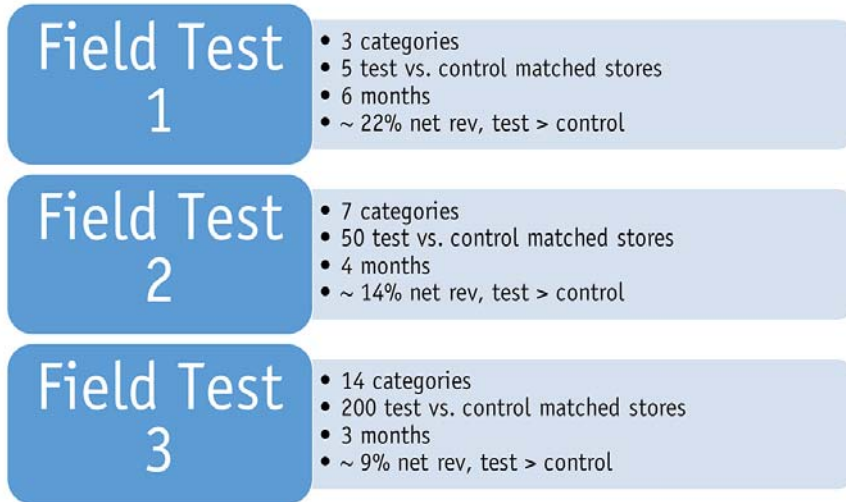
Essentially the opposite story is told in Figure 3 with Product YY. This product is very sensitive to price but is given the lowest average discount. To buy more customers tend to need a larger discount.

### ‘How cool!’

So the company saw the results of the model and said, “Wow, how cool!” Actually it did not say that, especially the merchandisers. Again, in retail, as mentioned before, merchandisers rule the world. The last thing they wanted was for marketing to mess with prices. The merchandiser’s job is to buy inventory and forecast the stock outages to end at a certain time, e.g., end of month or end of quarter, etc. They would be nervous about marketing messing around with something that may affect their forecasts.

A field test was designed (Figure 4). The first one used three categories (those at most risk with strongest opportunities) and matched five test to five control stores. After six months the net revenue of the products chosen of the test stores outperformed the net revenue of the control stores by over 22 percent! Note that a test result of 2.2 percent would have been seen as positive and significant. So the retailer broadened and widened the second test. This now included seven categories and 50 stores. The net revenue of the products chosen of the test stores outperformed the

Figure 4



net revenue of the control stores by over 14 percent, over a four-month period. Not quite convinced, a third test was implemented, this time using 14 categories in 200 stores and in three months the net revenue of the products chosen of the test stores outperformed the net revenue of the control stores by over 9 percent!

What can be done with this information? It obviously can be used to

create pricing strategies by category by season. That is, both marketing communications and store merchandisers can raise/lower net price by adding/subtracting discounts, offers, markdowns, etc. This can be at the overall level but margin can be optimized by manipulating discounts by product categories.

It also has implications for marketing and advertising and messag-

ing/bundling. That is, given that we know which products consumers are price-sensitive to, a retailer could create offers that were so compelling that consumers might buy more of the same product or, more importantly, more of different products with richer margins.

### Pull the plug

I have done elasticity modeling myself dozens of times, for various industries in widely different competitive arenas. It always works. There is always opportunity. Note also that it is with little risk. Simply monitor the net revenue and if the test products are not performing just pull the plug. Stop the test. That's why elasticity modeling is recommended: It mathematically has to work, comes with nearly zero risk and there is a high probability of returning positive gain in net revenue. ①

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●●● non-conscious research

# Getting to the heart of it

Using consumer neuroscience methods to understand the power of emotions

| By Carl Marci

## snapshot

Carl Marci looks at how non-conscious MR tools can help marketers and advertisers tap into consumers' emotional side.

For those in and around advertising, the next few weeks leading up to the Super Bowl in early February are an exciting time. While football fans salivate over the matchups on the field, marketers can't wait for the drama that unfolds off the field – between touchdowns and stops in play. The Super Bowl isn't just one of the biggest sporting spectacles in the world, it may be the biggest spectacle in advertising – a competition for the hearts and minds of more than 100 million viewers (and millions more before and after the game online). Brands will showcase ads that have been planned and tweaked for months, with each considering new ways to unveil them and experimenting with new messages that, they hope, will connect emotionally with their target audiences.

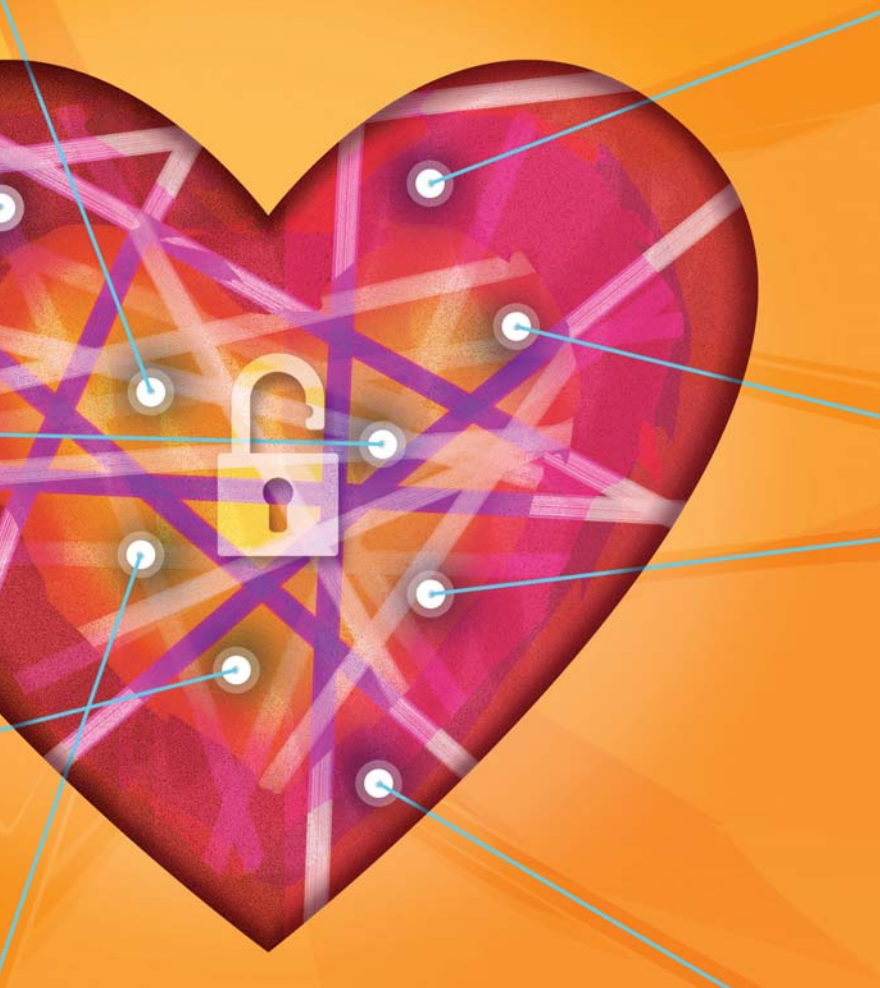
For marketers, focusing on making emotional connections in any communication is critical, given our modern understanding of emotion. Why? Because, at our core, we are not rational beings who occasionally act emotionally. Rather, we are emotional beings who occasionally act rationally.

This has been shown time and again, but perhaps no clearer than a 2009 Binet and Field study that highlights the role of emotion. The research sought to understand drivers of advertising success including the impact of “emotional” and “rational” approaches. The authors assumed both were necessary. The study reviewed more than 800 ad campaigns in the U.K., each with clearly-stated business objectives and hard business outcomes (e.g., sales, market share, price sensitivity, profit). To the authors' surprise, the data clearly suggested that the more emotions were at the center of the campaign, the bigger the business impact. Even further, researchers found that the positive outcomes for advertising campaigns were associated with little or no rational content at all.

The findings were fascinating and should have been illuminating for anyone in marketing. As a consumer neuroscientist, understanding and measuring emotion really intrigues me, especially during the Super Bowl, when the stakes are so high. Despite huge audiences, advertising approaches vary from humorous to serious to sentimental – from Clint Eastwood monologues to lost puppies; from fatherhood to child safety. But the end



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few manifest themselves as feeling states.

A significant amount of research shows that when an individual is confronted with a stimulus that elicits an emotional response, information about that response is manifested in the body and is stored as a somatic marker in the prefrontal cortex (and several other parts) of the brain. The prefrontal cortex is one of the most highly evolved parts of our brains and it has many, many connections to our emotion centers. When an individual is later confronted with a future, similar decision, relevant prior emotion-based somatic markers are accessed from memory centers and provide non-conscious feedback to help inform the decision.

In marketing, the goal of communications is to leverage emotional responses to create and amplify “meaning” and trigger emotional “approach” (as opposed to “ignore” or “avoid”) motivations in consumers. The outcome is the same regardless of the associated emotion word or subjective feeling state generated. Successful advertising leads consumers toward lasting connections with positive sentiment and ultimately an endorsement or purchase of a brand, product or service.

### An authentic emotional connection

While it is one thing to understand the need for creating emotional connections, it is something else entirely to understand how to accurately measure emotions and to know if creative executions ultimately deliver an authentic emotional connection to their target consumers.

For years, marketers had to rely solely on conscious measures to evaluate emotional responses. In traditional measures of self-report, such as surveys and focus groups, emotions are evaluated based on the words and associated language for the narrow feeling state experienced by the participant. There are two challenges in relying upon these measures alone. First, the reporting is done after the experience of the target stimulus, which introduces just a few of the well-known biases that can interfere with the accuracy of the research (e.g., hindsight bias, recency bias, recall bias). Second, as outlined above, much of emotion processing is happening below the level of conscious awareness and not all emotional responses reach a state where an emotion word or subjective feeling state is consciously experienced.

Fortunately for marketers, the tools available today from neuroscience leave them better equipped than ever to measure emotion. Advances in technologies and sheer computing power continue to make sophisticated methods more scalable and affordable, with quicker turnaround times and clearer insights. These market-ready measures

goal should be the same: to engage audiences on an emotional level that ties the story to the brand in compelling ways. These in-the-moment emotional responses are so critical for success because they work on a neurobiological level. Emotional responses are critical for forming brand-building associations in the brains of consumers that impact future buying behaviors.

This isn't just about Super Bowl Sunday. Competition for attention in our daily lives is getting increasingly more intense, something that cannot be understated when striving for marketing success. As our modern media landscape becomes ever more cluttered – from social media to text messaging to always-on e-mail – leveraging emotion when creating products and advertising is essential to breaking through.

### Always on and always working

So what are emotions and how do we measure them accurately in the context of marketing and market research? Emotional responses are an automatic, coordinated brain and body reaction to some stimulus of relevance to us in our environment. Our emotional system is always on and always working for us. While in general the stimulus could be internal (e.g., a thought or memory) or external (i.e., as experienced by one of our five senses) for marketers and market researchers, we mostly concern ourselves with responses to external stimuli (e.g., brands, products and their related consumer touchpoints). Emotional responses guide us by tagging information from our senses for relevance, signaling importance to us and directing attention, memory and decision making resources in our brains that ultimately impact some future behavior.

It is important to note that a large portion of emotional processing occurs below conscious awareness and is a more complex state than “feeling” states. Feeling states (e.g., happy, sad, angry, surprised) are more narrowly defined by emotion experts to reflect the relatively rare, more subjective and more conscious representation of some emotional experience. Thus, while all emotional responses have a non-conscious coordinate brain and bodily response, only a

with well-validated algorithms allow an unprecedented analyses of the early steps of consumers' non-conscious emotional processing in response to a wide variety of marketing communications.

In addition to technological advances, validation of consumer neuroscience techniques in-market has advanced rapidly in recent years. There have been a number of studies that show the relationship between various non-conscious consumer neuroscience measures of emotional response and behaviors relevant to marketers. These behaviors cross the spectrum and include correlations between various neurometrics of emotion and what consumers will watch, say and purchase.

These technologies include electroencephalography (EEG), biometrics (which includes traditional psychophysiological measures like skin conductance response, heart rate and respiration), facial coding, implicit response measures and functional magnetic resonance imaging (fMRI). All of these measures allow for the non-invasive measurement of some aspect of non-conscious emotional response and often draw on both models in order to provide valuable insights for marketers.

### Integrate multiple measures

One of the clear trends in both academic and business applications of consumer neuroscience is to integrate multiple measures for comparison and for new predictive power. In one of the largest comparison studies to date, researchers at Temple University collaborated with the Advertising Research Foundation in a study sponsored by large advertisers and media companies investigated the relationship between a wide variety of neurometrics and in-market sales. In this study, an area of the brain called the ventral striatum (typically associated with emotional or behavioral reward) was the strongest predictor of real-world, market-level response to the advertising tested. The team at Temple University also partnered with Innerscope Research on a Super Bowl study that combined biometric responses with fMRI results. The results showed that ads that had very high levels of emotional response as measured by the biometrics also showed increased activity in the ventral striatum as well as other important emotional and memory centers including the prefrontal cortex, amygdala and hippocampus.

It is my experience after nearly a decade of practicing consumer neuroscience that there is no single technology or methodology that has a monopoly on the truth. It is also clear that each method has value and it requires experience and expertise to know the strengths and limitations of each. The following is a brief overview of each of the most widely used consumer neuroscience technologies:

**EEG** is a time-tested measure in consumer neuroscience and reflects the direct electrical activity in neurons in the upper cortex of the brain as cells become active to convey information. High-quality EEG is typically more complex than other measures but as a direct measure of brain activity, it has been demonstrated to be one of the best measures of emotion motivation (i.e., approach vs. avoid response) on a non-conscious level.

**Biometrics** refers to a variety of measures of the autonomic branch of the peripheral nervous system that indirectly reflect brain responses but directly measure the embodied response and components of emotional response. Measures of heart rate, skin conductance and motion represent the very earliest of the steps in emotion generation. One advantage of biometrics is the ability to capture "upstream" emotional reactions, even when these emotional experiences are not experienced on a conscious level.

**Facial coding** is a relatively new tool that has been automated with software that allows near real-time measurement of the emotional expressions of consumers as they experience marketing content. The technique can be a useful diagnostic tool to understand whether a stimulus has elicited a specific facial expression (e.g., a smile) and is increasingly used to evaluate ad effectiveness. It must be kept in mind, however, that facial expressions evolved to communicate our feeling states in a social context and therefore occur at relatively low levels in the context of the passive media upon which the vast majority of marketing communications occur (i.e., television, Internet, out-of-home signage).

**Implicit response testing** is another technique that can be used to try to understand information – specifically, semantic associations or "feeling states" – that individuals are unable or unwilling to verbalize. Consumers are provided stimulus to react to and timing of the responses captured can show non-conscious

associations with brands and products. It can be used for understanding branding, positioning, ad messaging and packaging.


**Eye-tracking** monitors eye movements to pinpoint where someone is looking – whether on screen, on a store shelf or elsewhere. Often used in addition to other technologies, it provides very specific feedback about whether consumers are experiencing the elements of your creative, packing or placement in the way marketers want.

**Functional magnetic resonance imaging** uses a massive rotating magnet to take images of the brain while participants lay in a large oval-shaped magnet and complete cognitive tasks or watch marketing material. The machine and computers can measure changes in oxygenated blood flow to understand which brain regions are being activated. Activity during the task of interest (e.g., watching an ad) is subtracted from activity during some independent baseline or control task (e.g., looking at a fixation dot). Brain activity that remains following the subtraction is assumed to be uniquely related to the target task and not to the control task.

### Address the challenge

None of these technologies has all of the answers. What they do, in tandem and individually, is address the challenge that's fundamental to marketers: understanding consumers who are more distracted every day. Mobile devices and mobile connectivity provide us with more options and something shiny, new and entertaining is always just a swipe or a click away.

In this environment, leveraging a deeper understanding of emotional response in messaging, imagery or other creative content to capture the hearts and minds of consumers is critical to getting a brand or product noticed, remembered and selected over competitors.

The Super Bowl, and the halo surrounding it, provides marketers with tremendous opportunity to make these connections. For those of us connected to marketing, the competition to see who delivered that emotional connection is even more exciting than the emotions that will be spilled on the field. 

Carl Marci is chief neuroscientist at Nielsen Consumer Neuroscience, a Boston research firm. He can be reached at [carl.marci@nielsen.com](mailto:carl.marci@nielsen.com).





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●●● the internet of things

# Tracked from morning to evening

What can MR do with data from consumers' digital lives?

| By Felix Rios

## snapshot

The author charts his own connected life and ponders the impact of the many new data streams on marketing research.

I wake up every day around 7 a.m., my iPhone rings, I pick it up and snooze it three times before I actually have enough strength to get out of bed. The first thing I tend to do is check the weather, followed up by WhatsApp messages, Facebook and work e-mails.

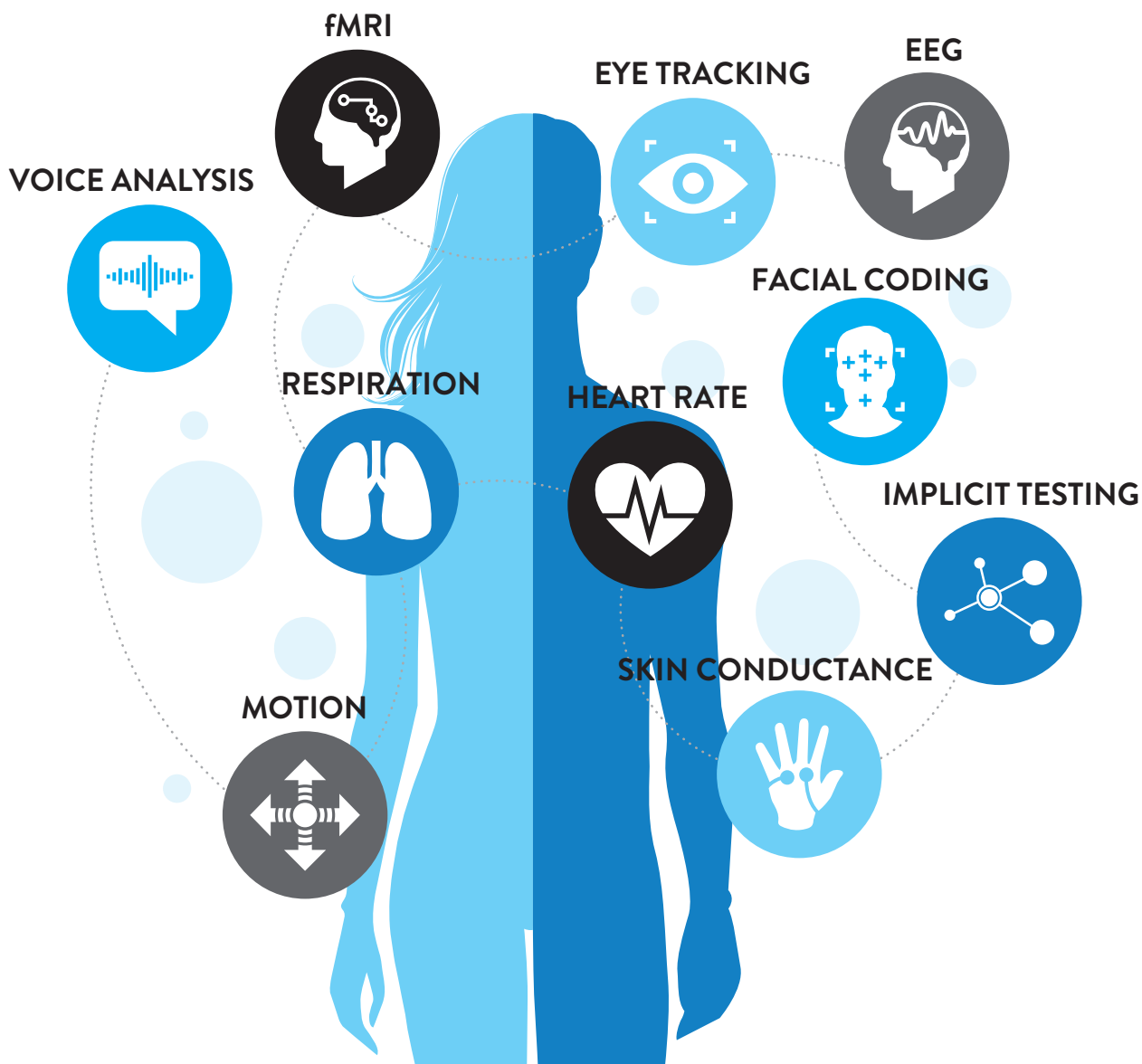
I prep myself to go downstairs and take the streets. When walking to the kitchen, I like looking at the Nest thermostat on my living room wall; the screen just fades on beautifully and shows me my house temperature.

I grab a glass of orange juice and log it in my MyFitnessPal app. I'm trying to live a healthier life and logging every calorie I consume is supposed to help me achieve that. I cheat very often and tend to "forget" to log the odd Krispy Kreme.

I open Google App and it tells me when my next train departs from my station. I rush out of the house, open Spotify and sometimes if I feel adventurous enough I pick one of the

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recommended playlists.

Walking to the station, I look at the Nest app on my phone to make sure that it has set itself to “away” mode. I know it will do it but it makes me feel that I’m finally living a *Jetsons*-like life. No sign of flying cars or a robot maid yet but my phone is talking to my house’s thermostat.

It takes me an hour to get from my house in Southwest London to the office in Central London. I have enough time to read my magazines and social media on Flipboard and check my health app on my iPhone. It is nicely aggregating the calories from my food diary and counting my daily steps. My Fitbit doesn’t communicate with Apple’s HealthKit yet, so I have to open another app to see my sleep patterns.

In the office, I’m juggling between Outlook, Chrome and Excel to get my work done. I’m clipping all sorts of useful stuff using my Evernote account, which allows me to always have those interesting clips readily accessible on any of my devices.

Around 3 p.m. I get a motivational text message that I set up via IFTTT connected to my Fitbit, reminding me that I have to walk more if I want to meet my daily step target.

At 5 p.m., I walk to Starbucks. As I’m approaching the store, the logo discreetly pops up in the bottom left corner of my iPhone, I swipe up and my loyalty card is ready to pay for my skinny tall latte. One more star and I get a free coffee.

Another notification pops up, this time, Mynd is reminding me that my next conference call is in 30 minutes. Kindly it also tells me that it takes me 10 minutes to walk back to the office.

It’s now 6:30 p.m., time to start Spotify and check with Google when is my next train home.

### Sensors and gadgets

I am a self-confessed geek and an early adopter. I have the inexplicable urge to get my hands on the next technology device that promises to change the world. On a daily basis, I have more sensors and gadgets on me than Neil Armstrong on his first expedition to the moon. Google,

Facebook, Nest, Apple, Fitbit and Netflix know more about my life than my mom, my wife and probably myself. I am aware that this makes me part of a very rare minority, however, this plethora of devices and interactions with applications convert me in a data goldmine!

When I made the conscious decision to live a connected life, I accepted that companies will be mining my data. It’s the price I’m paying to get better and more relevant products. The growth of social media platforms and Gmail may show that other consumers think the same way. We keep signing up for store cards to get discounts for example. Those pesky store points increase slower than the Mumbai traffic yet I better not forget to hand over my supermarket card at the checkout!

While the amount of data that I broadcast on a daily basis is ideal to understand my behavior patterns and preferences, it also shows clearly one of the challenges for the market research industry: My data resides in silos. The devices, applications and manufacturers are making sure that it remains like this.

If Starbucks could see my Fitbit data, it could suggest one of the lighter options when I walk to the store. It might prompt me to buy a granola bar instead of a double chocolate muffin or a soya milk latte instead of a caramel macchiato. It could even automatically update my calorie count and the impact on my daily steps goal to compensate for the indulgent coffee break.

Siloed data is a big challenge. Both Apple and Google understand it and are trying really hard to push their own aggregation standards. Apple’s solutions are HomeKit and HealthKit. Google’s is Nest (via Thread standard) and it also recently released its answer to aggregate data from health trackers, Google Fit.

A unified standard is the foundation for a universal data aggregation platform that will allow us to get actionable insights at a level that we have never been able to get before.

### Peace of mind

Market research panels and online communities are the natural place

for us to start exploring these technologies and the natural place for them to grow and mature. First and most importantly, it is critical that the recruitment process complies with all the industry regulations, guidelines and best practices. This gives participants peace of mind that their data is being used exclusively for research purposes.

It is important that we protect and nurture the trust that our participants have in us. We should remember every day that it takes years to build trust but only seconds to break it and forever to repair it.

At our firm, our experience recruiting specialized device panels of physicians and supporting device consumer panels has shown us that technology is a very engaging and attractive incentive. With a layer of good and constant communication and the correct level of support, we are able to keep them highly engaged with minimum attrition and high levels of satisfaction.

Already the Internet of Things (IoT), wearables and connected

device manufacturers have started to take baby steps in allowing access to some of the data via API. While the concept of aggregating multiple data sources is not alien to the marketing research industry, in the very near future it will be our bread and butter. As this technology becomes mainstream, our clients will demand it from us.

A few years from now, I can see life for this type of research outside of panels and online communities (e.g., IoT and wearables). I can also see a public marketplace of data where individuals would be able to select what information to share and choose the best bidder. If I am generating all this data, why can't I just sell it directly? I can even see a band system where my data costs more depending on how granular it is. As participants become aware that their data has monetary value, it will lure more people into this vast and open behavioral data marketplace, making it richer and more dynamic.

You just need to do a simple Google search for "wearables fore-

cast" or "Internet of things forecast" and you are going to see that the future is nothing but exciting. The next 10-15 years promise to wow us. If the analysts get it right, in the next decade, our homes, cars and personal devices will be connected and talking to each other.

In its essence, market research is about observing the few to understand the behavior of the many. Asking questions has been one of the most important ways we've had to get data. The new breed of devices that will inevitably be part of our lives will not only allow us to ask fewer questions but will also allow us to make them more relevant, smarter and contextual. We have to understand this and embrace it. This will be one of the most important changes that our industry has made since we started collecting data. 📌

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# Cast the right net on the Net

Is social media useless for research?

| By Paul Oram

## snapshot

Social media data is a boon but generating insights from it takes a lot of work and careful thought, the author says.

Facebook has over 1.49 billion monthly active users worldwide and every 60 seconds, 510 comments are posted and 293,000 statuses are updated. On Twitter, over 500 million tweets are posted a day. We have all seen statistics like this. Most of us will also have heard the logic that flows from this: These millions of unfiltered social conversations are a treasure trove for researchers seeking insight into consumers' lives, opinions and behaviors – all you need to do is tap into them, run some smart analytics and away you go.

In the real world things are painfully different and in practice getting genuine insight from social media listening is much more challenging.

Harvesting social data is a bit like trawler fishing; you cast a big net out into a wide expanse of ocean in the hope of landing a good catch. If you use a net with a fine mesh you catch pretty much everything that swims, the vast of majority of which is useless to you. Most social data tools cannot distinguish between content that has originated from a consumer and content produced by a brand, or worse still, a bot. Analysis platforms have a long way to go before they can accurately classify the authors of social content. It's only as you manually pick through your catch that you find how much of it is total junk.

Go with too wide a mesh and some really fine specimens that just happened to be a bit too small will be missed and you'll never know they were even there. This often happens when trying to research broad subject areas, for example "snacking." People talk about subjects like this in many different ways and getting a good sample out of the noise becomes a neverending quest to refine keywords, products and brands while fighting to exclude all the usages that don't fit with your target.

### Lack context

A lot of social posts lack context or, rather, the majority of social listening tools are not designed to retrieve it. For example, in a lot of tweets the author expresses his or



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her opinion and links out to a piece of content. Unless you follow that link and assess what the content is about you cannot really tell if it is relevant to your research.

A frequently-used item of context is geographic location. Let's say you want to focus a study on U.K. consumers. You might set your social listening platform to only include content originating from within the U.K. The problem is, only a fraction of social posts are geo-tagged so you're missing out on lots of relevant content. Listening platforms use various techniques to try and work around this; for example by extrapolating from a single geo-tagged tweet to the assumption that other tweets come from this place. Other platforms dig into the author's bio and if the author has specified a location they assume everything they post is from there. These are big assumptions and must be factored in when working on studies that have an important geographic component.

What about the data sources themselves – the social channels? Can we consider them representative? For obvious privacy reasons, social analytics platforms can only tap into content that has been shared publically or channels under brand control (for example, its Facebook page). The problem is that people share a lot more privately ("dark social" as it is sometimes

termed) than publically – reportedly around 70 percent' is shared privately. The subjects that people share publically are also heavily skewed; people are fine publically sharing posts about their pets but are much more reticent in almost every other content category. All too often public content is not coming from people but from brands and bots.

Listening platforms are almost entirely geared towards text-based searching and analysis. A lot of sharing, particularly among younger generations, involves a high percentage of image and video sharing. If the poster provides enough context in any associated description or tags it's sometimes possible to pull images from the stream. They can be useful for providing qualitative color to a study. However, until image search and analysis algorithms improve significantly this type of content is largely a dead zone for social media research at scale.

When you do manage to land a good catch of healthy, tasty-looking fish/social content, how do you sort through it all? Most platforms are fine at counting how many times your brand has been mentioned – assuming you've got an easily distinguishable brand name like Heineken. Try doing that if you're Next! Does counting how much you've been mentioned actually tell you very much? It can occasionally be useful

for benchmarking purposes but in most cases it's a vanity metric.

You probably want to know if people are saying good or bad things about your brand or product. Most tools will sport some form of sentiment analysis which categorizes posts into positive, negative or neutral. The reality is that the error rates on such tools are tremendous and it's not just because of the classic issue of detecting irony and sarcasm; frequently there simply isn't enough context in what the person has said to be able to distinguish sentiment and even humans struggle to place content into such simple polarity categorizations.

Some social-listening platforms claim to be able to go deeper than simple polarity categorizations through the application of machine-learning techniques. They purport to be able to classify posts into categories such as purchase intent. Trouble is that in our experience, they only really work if you have neat, mutually-exclusive categories each with distinct language patterns. You will rarely find yourself in this enviable position.

### Useful for research?

With all these challenges and limitations, is social media-listening useful for research? Yes but you need to be selective about the business questions you seek answers to and where you go fishing.

Generally, the more specific the question the better as it is usually much easier to craft the query to pull a good signal out of the noise. Self-evidently you need to be going after something that a decent number of people are talking about on social channels. For example, understanding initial reactions to a major new phone launch is likely to yield good results. Even in a domain like this the challenge of filtering out brand and promotional message should not be discounted – bots are designed to exploit anything that garners a lot of engagement to spread their own unrelated messages.

The art of successful social listening is identifying channels and Web properties that provide high-quality social content. Forums, for example, typically provide categorizations

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and tags that are useful for getting context and metadata on the user-generated content and the author. It's critical to have an approach that is capable of gathering this context and making it available for analysis.

As you would expect, where people write longer-form content they express more complex and nuanced opinions, which can yield useful insight. The challenge is how do you break such posts down into the entities and concepts to uncover what things people are talking about and what they are saying about each thing? Natural language processing technologies are now capable of addressing this challenge at scale, enabling you to discover patterns and insights across large volumes of conversations.

At the risk of stating the obvious, any business process that has a social component – be it your own or a competitor's – can usefully have social listening applied to it. Customer service, promotions and content marketing efforts are clear targets here. What are your customers complaining about? Which elements of competitor customer service are they raving about? Which of your competitors' social media campaigns are driving engagement from your target segments? What types of content are customers like yours sharing? These are all good business questions to be asking of social-listening research.


Focusing on the authors of social content can sometimes be a much more interesting avenue of research. You don't need to pull things out from the social fire hose based on a target topic. You can instead select your target audience – for example, a large group of your existing consumers – and analyze everything that your audience has publically shared over the last year. This is a great technique for getting a deeper understanding of the digital lives of your consumers, how they break down into discrete communities and what influences them.

In summary, if you going to use social media successfully for research consider the following:

- Frame the business questions as specifically as possible. If they are too broad you're better off going

back to the drawing board.

- Identify and focus on the cleanest, most context-rich set of data sources where consumers are talking about your target topic of interest.
- Be mindful of the filtering and skews that using social content inevitably introduces.
- Figure out how you're going to analyze the content for qualitative insight. Do you have a platform that enables to you explore the meaning of what people are saying?
- Find ways to get more context

around social content – follow links to understand what content is being shared and dive into author profiles and classify them. 

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#### REFERENCE

<sup>1</sup> "Dark social: We have the whole history of the Web wrong." *The Atlantic*. October 12, 2012. [www.theatlantic.com/technology/archive/2012/10/dark-social-we-have-the-whole-history-of-the-web-wrong/263523/](http://www.theatlantic.com/technology/archive/2012/10/dark-social-we-have-the-whole-history-of-the-web-wrong/263523/)

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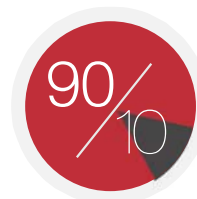
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# Help them help you

How to maximize survey response rates

| By Robert DeVall and Charles Colby



## snapshot

An overview of best practices for enhancing the chances that respondents will open and complete your survey.

With an ever-expanding list of options at consumers' fingertips and the figurative pedestal given to them via social media, organizations have come to recognize the growing importance of keeping their customers happy. Billions of dollars are spent on efforts to improve the customer experience and the companies that are most successful typically rely on feedback from customers to drive these efforts. This is generally good news for market researchers but also presents a challenge: As more and more companies vie for customers' attention, it becomes harder to get. This can result in lower response rates, which increase the likelihood of non-response bias and can ultimately make the findings less reliable. This begs the question: What can market researchers do to maximize response rates?

To answer that question, first we need to fully understand what drives response rates. The response rate, in simplest terms, is the number of people who completed the survey divided by the number of people in the sample eligible for the survey. This means to effectively raise response rates, we must focus both on the recruiting tool and the survey instrument. For surveys administered online where respondents are invited via e-mail, maximizing response rates entails 1) getting the respondent to open the e-mail, 2) getting them to start the survey and 3) getting them to finish the survey. Failing to take any of these facets into account can result in response rates that are less than optimal.

### Objective 1: Get the respondent to open the e-mail

Before sending the e-mail invitation it is a great idea to send a heads-up e-mail or letter notifying the respondent that they can expect an invitation to take the survey. This is especially useful for customer or non-profit member surveys, where the heads-up communication comes from an executive or recognizable individual within the organization. This provides credibility for the company administering the survey and can also be used to request certain e-mail addresses be placed on a safe-sender list.



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The next step is getting the e-mail invitation into the respondent's inbox. This can be more challenging than it seems as spam blockers don't readily share their filtering practices (with good reason), nor are all spam blockers alike in the criteria they use for filtering. That means there is no fail-proof formula to avoid getting caught in the spam trap but there are some things that market researchers should do (or not do) to at least have a fighting chance.

- 1) Avoid words like "free" and "win," ALL CAPS, excessive punctuation "!!!," symbols and special characters.
- 2) Follow the requirements of the CAN-SPAM Act. This includes putting a valid physical mailing address in your e-mail and offering a clear opt-out link.
- 3) Don't spoof e-mails. Sending from a mail server you own (and have properly configured) helps ensure that you pass spam filter authentication tests.

Researchers should also pay careful attention to the FROM and SUBJECT fields of the e-mail. The FROM field should be recognizable and should avoid generic terms (info, feedback, customer support, etc.). Using the company name is the most common practice but using a well-known company representative's name can also be effective. The SUBJECT line is essentially the headline of the e-mail and should make the recipient want to keep reading. It is important to convey the topic of the e-mail and highlight what is in it for the respondent. Ideally, subject lines should be less than 50 characters. Clear, concise subject lines are more likely to be opened.

The next thing to consider is the date and time the e-mail is delivered. The objective here is to get the e-mail to the respondent at the time they are most likely to read it. There are several theories on when the best time to send e-mails is, with the general consensus being to send them during the daytime, with Tuesday, Wednesday and Thursday being the best days to do so. That being said, this may differ depending on the audience being targeted. For instance, some groups may be more accessible in the evenings. It is also important

to take into account holidays and time zone differences.

Lastly, send reminder e-mails. There are a number of reasons a respondent may not have completed the survey besides not wanting to. They may have missed the original e-mail, meant to take the survey later and forgotten, started the survey and gotten interrupted, etc. The number of reminder e-mails depends on the audience and the length of the data collection period but two reminder e-mails is generally sufficient to remind respondents without annoying them. It is also critical that reminder e-mails be targeted to those who have not completed the survey. Ideally, targeting should be taken a step further to tailor the message based on where the respondent is in the process. For example, if a respondent started the survey but did not finish they may get a "you're almost done" e-mail, while someone who has not started would get an e-mail that more closely resembles the original invitation.

### **Objective 2: Get the respondent to start the survey**

The e-mail invitation has passed through the anti-spam gauntlet, found its way to the respondent's inbox and they are taking the time to read it. It is now time to drive home the value proposition of the survey. It is also important to use the e-mail to set expectations for the survey, including: how much time it will take, the topics that will be covered, privacy/security of the information and how the information will be used.

To many, "reward" typically means some sort of tangible incentive (gift card, drawing, etc.). This type of reward is definitely effective but they are not always appropriate or in the budget. Researchers should also be cognizant of biases that certain incentives could create (e.g., offering a discount for the company being researched is likely to elicit responses from those who plan to shop at the company again, potentially leaving out shoppers that were so dissatisfied that they do not plan to return).

While tangible rewards are certainly a nice way to show respondents appreciation for their time, researchers should not overlook the intangible rewards respondents receive

from taking a survey. Most people are helpful by nature and for many taking surveys can be empowering, as it enables them to actively help companies improve. To this end it is important to communicate how their feedback will be used to improve the product, service or experience. It is also beneficial to close the feedback loop whenever possible by communicating the findings from the research and positive changes that are made based on customer feedback.

The body of the e-mail should also instill trust. As previously mentioned, being CAN-SPAM-compliant is a step in the right direction but market researchers can go further by including contact information for questions and support. Respondents are also generally more likely to take the survey if anonymity and confidentiality are promised. Regardless, a link to the privacy policy should be included in the e-mail or on the first screen of the survey to ensure respondents are clear on how their data will be used.

Another way to instill trust and establish authenticity is to personalize the e-mail using merge fields. This also makes the respondent feel that they are receiving personal attention and distinguishes them from the group. Respondents are more likely to ignore a generic e-mail addressed to a group, as they are prone to assume someone else from the group will respond.

Lastly, tell respondents how to start the survey. This may seem obvious but is often overlooked. The link to the survey should be in the upper half of the e-mail and be immediately noticeable. Most respondents skim the e-mail at best and many stop after the first paragraph. They are not going to take the time to search for a link that is embedded deep within the text of the e-mail.

### **Objective 3: Get the respondent to finish the survey**

The final step in the path to higher response rates is getting respondents to finish the survey. This is all about minimizing the "cost" of taking the survey. In order to minimize the cost to respondents it is imperative that the survey be as short as possible, easy-to-take and convenient.

**Ask less.** The time it takes to complete the survey is the primary burden

the respondent faces and often one of the more challenging things to avoid. It is important to identify and include only the questions that are needed to meet the objectives and avoid the nice-to-know questions. The question wording should also be clear and concise and skip logic should be used to avoid asking questions that are not applicable. Lastly, include a progress bar. Respondents appreciate being able to see how far along they are in the survey and seeing the “finish line” can help motivate them to complete it.

**Make it easy.** The last thing a respondent should feel when taking a survey is frustration. Frustration can stem from unclear question wording, insufficient answer choices, clunky design and errors in the programming. The vocabulary used in the survey should be simple and jargon-free. Answer choices should be comprehensive. Respondents often get annoyed when they are forced to select an answer that does not apply to them, therefore, “other” and “none of the above” options should be included where applicable.

Using interactive scales and sliders is a great way to engage respondents but features like these can also detract from the experience if they do not make sense for the questions being asked. Question formats should also be used consistently for each question type. This allows the respondent to get a sense of what the question is asking before even reading it. Of course, the most important thing to avoid is programming errors. Test the survey, test it again and then do a soft launch to a portion of the sample to ensure there are no issues.

**Make it convenient.** Giving respondents the freedom to take the survey where and when they want to increases the likelihood of participation. Making the survey accessible on a variety of devices is paramount to providing this flexibility. Mobile accessibility is particularly valuable as it allows respondents to take the survey during their down time (e.g., waiting for the doctor, traveling, etc.). It is also important to allow respondents to save their responses and pick up where they left off, as a respondent is unlikely to enter responses more than once. Again, this gives respondents the flexibility to complete the survey on their own time and at their own pace.

## A methodical approach


Maximizing response rates requires a methodical approach that takes into account the audience and topics being addressed and tailors all aspects of the data collection process accordingly. These guidelines provide a solid footing for achieving higher response rates but unfortunately sometimes response rates can still end up being less than optimal depending on the audience and topic of the survey. So what then? Thankfully, lower response rates do not necessarily signal disaster for the study.

Responders and non-responders do not come from different planets. The reasons for not responding to surveys are typically due to a lack of time or unwillingness to complete surveys, rather than to a dramatically different viewpoint on the study topic. The result is that the general conclusions from a study are likely to remain the same regardless of response rate.<sup>1</sup>

The point can be illustrated by running the math on a hypothetical situation. Suppose an online satisfaction survey achieved a 25 percent response rate and that the satisfaction level was 65 percent. Qualitatively, the conclusion may be that satisfaction is “OK” but there is room for improvement. Assume that there is non-response bias and that non-responders are only 55 percent satisfied. What is the impact of non-response? If we had doubled our

efforts with a more rigorous data collection methodology and achieved a 50 percent response rate, the satisfaction rating would be 60 percent, only five points off from the statistic computed using the methodology with the lower response rate.<sup>2</sup> The conclusion would remain much the same.

Another factor to consider is that measures of comparisons across brands or over time will be similarly affected by the same response bias, allowing valid measures of differences and/or change. So long as the methodology is consistent, stakeholders can take comfort that differences and changes are probably due to real factors and not a response bias. With this in mind, it is important to ensure that the methodologies remain consistent.

This is not to say response rates aren’t important, just that survey data should not be thrown out wholesale because the response rate is not approaching 100 percent. 

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### FOOTNOTES

<sup>1</sup> No study is the same and researchers need to make a judgment call as to whether non-responders could be dramatically different and design methodologies to minimize the impact.

<sup>2</sup>  $((25\% \times 65\%) + (25\% \times 55\%))/50\% = 60\%$



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# Both in search of the same thing

How UX and MR can coexist and complement each other

| By Linda H. Hwang



## snapshot

Why don't more market research professionals embrace user experience research?

**M**arket research professionals who have embraced user experience (UX) research glean value and insight that conventional market research methods cannot deliver. All too often market research professionals, based on commonly-held fallacies, dismiss user experience research in favor of more traditional marketing research.

Here are seven of the most common fallacious beliefs, along with arguments by market research veterans on how marketing and UX research can and should coexist and even complement one another.

### Fallacy #1: We can get away without user feedback

Who needs to talk to users, anyway? We know they'll love our product, it's so fantastic. After all, we love it, and we're the experts, right?

Not so fast: Plenty of products have failed because consumers could not figure them out. A very memorable example is the 2013 disastrous launch of the [healthcare.gov](http://healthcare.gov) site. Although usability issues made up only a fraction of the site's highly publicized problems, it was obvious to everyone that gathering user feedback had not been a part of its development process.

Ignoring users' needs is an understandable, but avoidable, mistake. "Web interaction design teams kind of live in a bubble; sometimes they forget they're designing for real people," says Kerry O'Hara, Nationwide's director of research and marketing strategy. Through a process of eliciting users' raw commentary and their natural behavior, usability testing can pierce that bubble and keep the focus on the customers.

Additionally, usability testing is best performed early in the design and development stages. Several studies estimate that the cost of fixing defects discovered late in the software development process was exponentially higher than if they were resolved at an earlier stage.

Avoid replicating [healthcare.gov](http://healthcare.gov)'s epic (and costly) fail by getting user feedback



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A recent study conducted by a client shows that the **Enhanced-Wireless™** sample “provided better demographic representation and a greater incidence of respondents aged 25 and under.” **Enhanced-Wireless™** also dramatically improved hit-rates for geographic areas such as ZIP codes or counties, as compared to RDD Wireless sampling. Our client reported that “the greater efficiency of the **Enhanced-Wireless™** sample requires fewer records to be purchased and lower interviewing labor to reach respondents” - resulting in a 20% to 30% cost savings.

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on your products early and often to avoid being trapped in a bubble.

### **Fallacy #2: UX research is very narrow in focus**

Many people (and not just those in the marketing field) perceive UX research as consisting only of usability testing. Although usability testing does constitute a large portion of UX research, there's more to this research than product-based tasks.

For example, "omnichannel" testing literally takes testing outside of the lab to capture the holistic consumer experience in a variety of digital and physical environments. These types of field studies inevitably encounter real-life factors that can't be anticipated or replicated in a usability lab and yet reveal important findings and insights.

It's vital for all researchers to realize that the scope of UX research is growing and there is value in "thinking outside the lab." Marketing researchers, including Teri Hughes at Intel, are already doing this: "Sometimes, somebody will bring up usability and say, 'I don't know if I need it' but they may be thinking about it in a very narrow sense; I think the whole space of usability/user experience is much broader than it ever used to be, because of how technology has evolved. It touches everything we do today," Hughes says.

### **Fallacy #3: UX research is expensive**

Compared to quantitative marketing studies with samples of hundreds of participants, the cost of usability testing is generally more affordable. Since usability tests typically require a much smaller number of participants (for more on the fallacy about the need for a large sample size, see #4 below), the outlay for expenses for recruiting, user compensation and researchers' time can be a fraction of what a marketing study costs.

Ed Podraza, business insights at Allergan, points out that "usability research is very affordable relative to other research methodologies or compared to the overall investment in your campaign."

It's worth the time to get rate

quotes from UX professionals to see how affordable testing is, before you assume UX is too pricey for your budget.

### **Fallacy #4: A large sample size is necessary for meaningful data**

To achieve statistical significance in the data, market research studies typically require sample sizes of hundreds of consumers to flush out the outliers and ensure the results closely align to the total population.

Usability studies differ from quantitative studies in their focus: They diagnose problems. Quantitative studies generate measurements, so a larger sample size increases the accuracy of the measured quantities. Since usability tests produce qualitative insights, it is possible to discover a large fraction (85 percent is the frequently-cited percentage) of a product's severe problems with a smaller number of users, usually in the range of five to eight. Beyond five to eight users, the likelihood of discovering additional severe problems decreases and the money that would be spent on a larger sample size can be better utilized on a usability test of the next (corrected) version of the product.

The smaller sample sizes for usability testing can be difficult for market research practitioners to accept. "I was one of the non-believers," says Alicia Schmid, Michelin North America's digital consumer experience manager. "I knew we didn't need hundreds of participants but when I was told eight to 12 users, I was like, 'What?!' Now when I am pitching usability testing internally, I tell them we will run eight participants; after six participants you will have all you need and then we can tackle lower-priority areas."

### **Fallacy #5: Focus groups are the best way to gather user qualitative feedback**

Focus groups are a popular method for collecting feedback in a quicker time frame than usability testing (a two-hour focus group session can include up to 10 participants, versus individually testing all 10 for an hour each over several days). But

there are differences in the type of feedback gathered from these two methods that need to be considered. In a marketing focus group, users are typically asked for their responses to advertising messages or campaigns or new product development. In contrast, usability testing focuses on whether or not consumers can easily use a product.

"If I am asked to research a new advertising message, I'll often run two to three focus groups per segment to diagnose it," says Gary Martin, vice president of Travis Research Associates. "But a Web site is different. One of the best ways I have seen to research the efficacy of a Web site is to run in-depth interviews utilizing the usability testing methodology."

The intimacy of watching users interacting with the product can reveal areas that cause difficulties or confusion (as well as effective functionality and design) and can also inspire pragmatic solutions from the entire project team.

The other fundamental difference between focus groups and usability tests is the depth and quantity of the participants' feedback. In focus groups, the Type As may dominate the discussion and the Type Bs and Cs may not contribute much, if at all.

In usability testing, however, participants cannot hide in a group; each is tested in a one-on-one session. Participants are asked to perform tasks on a Web site or product and are observed as to whether they succeed. Instead of participants' opinions, usability testing seeks to capture exactly how they use the product targeted to them.

### **Fallacy #6: Anybody can moderate a usability test**

It is a common belief that moderating a usability test does not require preparation or specialized skills. All the moderator has to do is just ask some scripted questions or one can get a focus group moderator to pinch-hit for a usability test.

Not true, says Michelin's Schmid: "The usability moderator is very different from the focus group moderator. Usability moderators



have to have a technical understanding of Web sites that focus group moderators don't have to have, in order to make good recommendations. A usability practitioner's recommendations are based on best practices, not just on the feedback heard from users. Usability testing is an expertise."

Acquiring the skills necessary to moderate a usability test and recommend effective solutions requires many hours in the lab. You can conduct usability tests with untrained moderators but you'll get more reliable data and avoid numerous pitfalls using seasoned professionals.

**Fallacy #7: A company's Web site is solely a marketing vehicle**

It is easy to fall into the trap of thinking a Web site is a tactic to disseminate marketing messaging online and leave it at that. Web sites are often developed within the same paradigm as print collateral. Many times, Web sites are online versions of their current print campaigns.

Consumers view Web sites differently, as Allergan's Podraza learned. "Usability testing made me realize the Web site is a conduit to communicate with our customers; if the Web site experience itself is suboptimal, it's diminished the value of the investment we make in driving customers to it. Web sites are two-way interactions. Consumers visit your site for a reason. It is all about getting the right message to the consumer at the right time and in the right manner."


To consumers, a company's Web site is an extension of itself, a touchpoint; a subpar experience on the Web site is equivalent to poor customer service. It's been shown through numerous site analytics that when users bounce off of a site because of a frustrating experience, they won't go back.

On the other hand, a good or superlative user experience conveys positive messages to consumers: It engages – rather than repels – them. Although it may not initially seem like the case to marketers, a prod-

uct's user experience is a significant element of the brand's voice and good UX can coax visitors to linger and ultimately convert (and even become repeat customers).

Customers expect Web sites to be a portal to the companies behind them. If the site lacks access to customer support or a support chat feature, visitors interpret this omission as a clear signal of the company's lack of receptivity to communicating with its customers. Keep your lines of communication with customers open and visible; they will appreciate it.

**Win-win**

The experiences of the marketing experts cited above attest that marketing and UX research do not have to be considered an either-or choice. By first understanding how UX can work in tandem with marketing and then applying what you learn from a UX study to improve the user experience, you will gain on both fronts. And that's a win-win. 

Linda H. Hwang is a former senior user experience analyst at Usability Sciences, an Irving, Texas, firm.

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••• a Quirk's resource guide

# 20 TOP Mystery Shopping Companies

Mystery shopping is a vital part of the customer relationship management program for any business that places service and hospitality as key components of the value proposition. Mystery shopping can be one of the most cost-effective and flexible customer relationship management tools available. It can be deployed quickly and inexpensively. Moreover, it is a program that can be modified and tweaked on the fly, giving the client access to very current market research information without expensive set-up costs.

Mystery shopping allows business managers to quickly gather reliable and quality feedback from a customer's perspective. It is an invaluable tool for businesses seeking to evaluate a team's customer care performance levels, training budgets and the delivery of company mission statements to its core consumer sector. Five of the most common uses of mystery shopping are: review of customer brand perceptions; analysis of competitors; review of internal procedures and processes; evaluating staff performance; and evaluating point-of-purchase materials and the retail store.

Here is a list of some of the top firms that provide mystery shopping and store audit services.



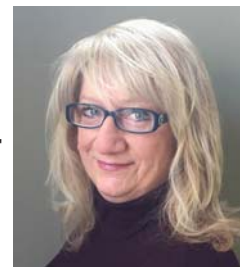
[quirks.com/articles/2016/20160111.aspx](http://quirks.com/articles/2016/20160111.aspx)



## Ann Michaels & Associates Ltd.

Founded 1998 | 11 employees  
Kathy Doering, CEO

Customer experience management firm specializing in mystery shopping, C-sat surveys, employee surveys, exit interviews and social media management. Today's consumers have higher expectations, a larger reach and louder voices. Keeping up with it all can be challenging even for the most customer-centric company. That's where we come in. Our customer experience measurement programs allow us to listen, engage and monitor the customer experience across all channels. Social media research, customer feedback and mystery shopping. Blending all the data together can give





## AQ Services International

Founded 2001 | 85 employees  
Jeroen (Jay) de Koning, Partner/Account Director



you a clearer picture of what your customer experiences when they come in contact with your brand.

Phone 866-703-8238  
[www.ishopforyou.com](http://www.ishopforyou.com)



## Anonymous Insights Inc.

Founded 1996  
Patti Lengel and Suzy Baker, Co-founders

Since 1996, Anonymous Insights Inc. has converted over 3.5 million pieces of feedback into



information that our clients have used to monitor and improve customer satisfaction. We offer industry-related experience, a nationwide network of shoppers, state-of-the-art technology and proven success in increasing customer satisfaction levels. We provide comprehensive, actionable data that allows you to see your business as your customers see it. This information provides you with the tools to develop employee behavior through reward/recognition and coaching/training programs. The result is increased customer loyalty and revenues. Methodologies include mystery shopping, satisfaction surveys, customer intercepts, telephone evaluations, compliance and price audits. Over 80,000 independent contractors throughout the world.

Phone 614-761-0939  
[www.a-insights.com](http://www.a-insights.com)

AQ Services International is a global business intelligence partner for your measurement work outside of the United States. We manage our own worldwide pool of fieldworkers through our local offices in the U.S., Europe and Asia. AQ specializes in mystery shopping and audits designed to deliver actionable and reliable insights that drive your frontline performance and sales. We are active in over 80 countries around the world with a dedicated team that speaks the language and knows local customs and culture. What drives us? Our passion and vision: to let people experience great service.

Phone 786-441-5268  
[www.aq-services.com](http://www.aq-services.com)

# BESTMARK

## BestMark

Founded 1986 | 100 employees  
Ann Jennings, CEO

BestMark is a leading market research, mystery shop and auditing company serving the world's largest and most respected, customer-focused brands across all industries for over 30 years. BestMark has performed over 8 million field service evaluations throughout North America and offers a strong and vast field force of over 500,000 evaluators who provide feedback using the most sophisticated mobile and Web surveying systems available. Since our inception, we've helped good companies become great companies with our comprehensive arsenal of proven surveying, auditing and management systems. Services include: mystery shopping, customer experience management, competitive intelligence, auditing, customer satisfaction research, mobile surveys, customer intercept/exit interviews and more.

Phone 952-922-2205  
[www.bestmark.com](http://www.bestmark.com)



**CANADIAN VIEWPOINT**  
REAL PEOPLE. REAL SOLUTIONS. REAL DATA.

## Canadian Viewpoint, Inc.

Founded 1980 | 55 employees  
Carol Udel, CEO



Canadian Viewpoint is a multimode, quantitative field firm with over 35 years in the market research industry. We've been helping clients evaluate employee performance and customer service quality on-site as well as tele-

phone mystery shopping for over 25 years. We conduct national mystery shops in English and French across Canada and the U.S. Our network of experienced and discreet mystery shoppers has worked in various industries and locations including banks, restaurants, grocery, electronics, clothing and telecommunication stores.

Phone 905-770-1770 ext. 226  
<http://canview.com>



## Confero, Inc.

Founded 1986 | 43 employees  
Elaine Buxton, CEO

Confero's customized solutions measure, monitor and report on employee performance, brand presentation, customer experience, user experience and compliance. The firm has 30 years of experience in mystery shopping, with deep experience with complex omnichannel fielding, data integration, brand representation at retail and on-the-spot rewards incentives programs. Confero was recognized with a Stevie Award for Customer Service Consulting Practice of the Year and is WBENC-certified. Our CEO, Elaine Buxton, has served as president of the Mystery Shopping Providers Association. Confero offers mystery shopping services on-site, on the Web, on mobile devices and using recorded telephone calls.

Phone 800-326-3880  
[www.conferoinc.com](http://www.conferoinc.com)



## DSG Associates

Founded 1981 | 50 employees  
Butch Nievera; Michele Jowdy, Main Client Contact

DSG is a leader in mystery shopping and field services for a broad range of businesses. If you need information about what happens between your company and your customer, DSG can help design and execute a program to collect it. DSG offers the capability and capacity to work as a partner in creating and managing programs for clients who demand integrity, reliability and responsiveness. The higher the standards clients have for programs, the more they appreciate our unique perspective and commitment.

Phone 818-574-5434  
[www.dsgai.com](http://www.dsgai.com)



## IntelliShop

Founded 1999 | 186 employees  
Ron Welty, CEO



IntelliShop partners with clients and research firms to deliver customer experience research solutions for every touchpoint. For research firms, whitelisting our services and Web portal (InSite™) allows you to maintain your brand presence with your clients. Our panel of more than 1 million shoppers can reach any geographic location quickly and efficiently for a variety of projects. We

combine the most innovative Web-based intelligence and analytics platform with our team of exceptional people to provide you with a level of expertise and extreme service that is unmatched.

Phone 419-872-5103  
[www.intelli-shop.com](http://www.intelli-shop.com)



## Just The Facts, Inc.

Founded 1994  
Bruce Tincknell, CEO



Our strategic mystery shopping begins with our 24 years of knowledge, quality and dedication to providing clients with actionable findings. JTF Shopping Group is your optimal choice for innovative solutions. Every client partnership begins with a thorough strategic analysis and assessment of the clients' baseline status, needs, objectives and end goals. JTF's proprietary four-step strategic process consists of client: a) understanding, b) learning, c) analysis and d) execution. Through this process, JTF Research measures employee effectiveness, strengths/weaknesses and opportunities. Key data points are gathered on employee and business assessment that leads to tangible actions that drive customer satisfaction. Our mystery solutions are much more than just gathering data. We monitor, analyze and develop best practices so our clients' business can achieve greater revenues, profits and ROI. Over 250,000 experienced shoppers nationwide.

Phone 847-506-0033  
[www.jtfacts.com](http://www.jtfacts.com)



## Maritz CX

### MaritzCX

Founded 1973 | 900 employees  
Carine Clark, CEO

MaritzCX helps organizations see, sense and act on the experiences and desires of every customer to increase retention, conversion and lifetime value. With an unmatched combination of customer experience software, research science, vertical market expertise and managed program services, MaritzCX delivers the world's broadest CX software platform and services business. MaritzCX mystery shopping teams understand your industry, including specific customer triggers, performance benchmarks and other channel nuances. As a result, MaritzCX knows how to collect the deep, meaningful insights that enable you to make concrete, measurable CX improvements.



Phone 385-695-2800  
[www.maritzcx.com/mysteryshop](http://www.maritzcx.com/mysteryshop)



## Market Analytics International, Inc.

Founded 2002 | 50 employees  
Michele McKenna, CEO



Market Analytics' mystery shopping capabilities include B2C and B2B across a wide range of industries globally. Our programs include in-person, phone and online shopping and inquiries. Market Analytics' shoppers cover a wide range of demographics, diverse multicultural backgrounds and native speakers of foreign languages. Our programs focus on measuring customer experiences and service levels, benchmarking and analyzing competitors, evaluating staff performance and ensuring compliance to standards and regulations. Our clients gain actionable insights that drive positive change within their organizations.

Phone 201-556-1188  
[www.MarketAnalytics.com](http://www.MarketAnalytics.com)



## Premier Service, Inc.

Founded 1991 | 31 employees  
Keren Dolan, President

Shopping since 1991, we are Canada's premier fieldwork and mystery shopping provider. Our diverse field team has their "feet on the street" across



the continent and around the globe. We are your eyes and ears, capturing the data you need when you need it. We specialize in mystery shopping, exit surveys, site inspections, merchandising and engagement programs the human way. 2016 marks our 25th year in business! We got here by offering "bend over backwards" service, top-notch survey design and completely customized solutions. Give us a call and let us do a free visit for you!

Phone 800-452-5150  
[www.premierservice.ca](http://www.premierservice.ca)



## Second To None, Inc.

Founded 1989 | 65 employees  
Jeff Hall, CEO

Second To None is a leading customer experience research agency. We help brands deliver consistent, intentional and authentic customer experiences. We are experts in customer touchpoint mystery shopping and voice of the customer surveys. Solutions are end-to-end from design through analytics and actionable insights, grounded in solid statistical science, strategic relevance and integrity. Brand leaders



leverage our assessments of operational standards through mystery shopping integrated with actual voice of the customer feedback surveys for competitive advantage. Through fusing complementary data streams transformative insights and priorities emerge, allowing clients to take action, affect positive change and drive improved business performance throughout their organization.

Phone 734-302-8400  
[www.secondtonone.com](http://www.secondtonone.com)



## Secret Shopper

Founded 1990 | 50 employees  
Paul F. Ryan, CEO

Secret Shopper is a full-service mystery shopping company focused on evaluating our clients' customer engagements online, over the phone and in-person. Our digital audit evaluates the user's Web site experience and manages your search engine optimization (SEO) and search engine marketing (SEM) strategies. A phone audit program coaches your employees to ensure they provide a positive experience that drives consumers to the store. Our on-site secret shopping program trains your frontline employees to close the sale. Come visit our Web site to learn more.

Phone 763-525-1460  
[www.secretshopper.com](http://www.secretshopper.com)



# See Level

Human Experience™

## SeeLevel HX

Founded 1991 | 65 employees  
Lisa van Kesteren, CEO

Our name says it all: we develop programs that help our clients see at the level of their customers. By utilizing solutions such as mystery shop, competitive intelligence, customer intercepts, consumer and employee feedback, social media platforming, in addition to many others, SeeLevel HX executes customer solutions that make organizations stronger and more effective at delivering the greatest possible brand experience. With the largest number of shoppers in the industry, we have our clients covered. We apply a consultative approach to the development of a variety of programs led by category experts with a wealth of experience.

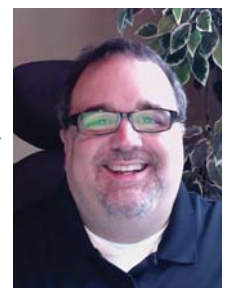
Phone 917-755-8849  
[www.SeeLevelHX.com](http://www.SeeLevelHX.com)



## Sentry Marketing Group

Founded 2005 | 13 employees  
David Agius, CEO

Sentry is a national customer analytics company based in Plano, Texas. We specialize in the design and management of mystery shopping and survey programs



for businesses ranging from local chains to national brands. Sentry's reputation for delivering industry-best reports is the result of our commitment to base each program on clients' specific needs, operating guidelines and organizational philosophy. Our integrated platform allows for mystery shopping and survey results to be delivered on the same platform. The result is a powerful business intelligence tool that allows our clients to improve customer loyalty and increase profits.

Phone 972-987-1696  
www.sentrymarketing.com



## Service Evaluation Concepts, Inc. (SEC)

Founded 1987 | 22 employees  
Arcadio Roselli, CEO

With over 27 years of experience, we at Service Evaluation Concepts, Inc. (SEC) have built a unique research concept that has worldwide reach. We uniquely help to translate strategy into action using a global panel of over 650,000 brand agents (certified research participants) and our proprietary Enterprise Feedback Management System (EFMS). Our brand agents operate as undercover CEOs (mystery shoppers) empowering brands to measure the human dimension of the designed customer experience (employees and customers) to maximize conversion and maximize advertising. SEC validates return on investment by using cause and effect linkage that clearly and positively impacts the corresponding financial key performance indicators.

Phone 516-576-1188 ext. 3530  
www.serviceevaluation.com



## SHOPPERS' VIEW

### Shoppers' View

Founded 1993 | 30 employees  
Jake Stroburg, CEO

Shoppers' View has been helping businesses define and achieve their best for over 20 years. We're one of the top mystery shopping providers in the country, boasting a variety of services that help our customers deliver the best customer service and competitive positioning in their industry. Our employees are each dedicated to a specific client so that they become experts in your industry as well as our own. Our consistency allows us to help you compare data over time and identify trends, improvements and areas that need additional training. Call us today to see what we can do to help you!

Phone 800-264-5677  
www.shoppersview.com



## SIS International Research, Inc.

Founded 1984 | 75 employees  
Ruth Stanat, CEO

SIS International Research is a global market research and strategic market intelligence company providing mystery shopping, market intelligence, sensory research, big data solutions, qualitative fieldwork and quantitative data collection. Our mystery shopping services include product research, customer service experience research, retail research/



audits and competitive pricing shops. Our headquarters is located in New York and our other key regional offices include London, Frankfurt, Shanghai, Seoul and Manila. SIS-SQREEM, our new big data methodology, applies sophisticated algorithms to extract insights from multiple layers of data collection. SIS also owns a focus group facility in the heart of Manhattan's Flatiron District in N.Y.

Phone 212-505-6805  
www.sismarketresearch.com



## TrendSource

Founded 1989 | 86 employees  
Jim Caltrider, CEO



For over 25 years, TrendSource has been the leading provider of mystery shopping services. In 1998, TrendSource became a founding member of the Mystery Shopping Providers Association. Each TrendSource mystery shopping program is developed to ensure the right questions are being asked, the data collected is on target and findings are presented in easy-to-interpret summaries that identify economic benefit, ROI and recommended actions. Our comprehensive in-house systems allow us to be nimble and provide our clients with high-quality solutions.

Phone 619-718-7467  
http://trustedinsight.trendsource.com

# Q

## Names of Note

### In Memoriam...

■ **Leo Shapiro**, who in 1955 founded Chicago research firm *Leo J. Shapiro and Associates*, which became *Shapiro+Raj* in 2014 after an acquisition by ad industry veteran Zain Raj, died on Nov. 9 at age 94 of natural causes.

■ U.K. research consultancy *McCallum Layton* has promoted **Alex Culshaw** to head of qualitative research.

■ Detroit-based research and consulting firm *Morpace Inc.* has appointed **Alan Czarnomski** as vice president on the brand strategy team.

■ **Greg Ellis**, an executive vice president and existing member of the executive team for Plano, Texas-based *Research Now*, has assumed additional responsibilities for the North American sales organization. The responsibilities assumed by Ellis were previously managed by **Tom Markert**, who has left *Research Now* to pursue other business interests.

■ *Experian Marketing Services* has hired **Bridget Bidlack** as vice president of global product management in the New York office.

■ In New York, research consultancy *TNS* has appointed **Howard Lax** as

head of customer strategies for the Americas region.

■ Westlake Village, Calif., research firm *J.D. Power* has appointed **Greg Hoeg** as vice president of U.S. insurance operations.

■ **Jim Daxner** has joined Shelton, Conn., research firm *SSI* as senior vice president of sales for the Americas.



Daxner

■ *Lieberman Research Worldwide*, Los Angeles, has named **Joan M. Lewis** to its board of directors.

■ **Bob Macdonald**, president and CEO of Canada-based brand loyalty agency *Bond Brand Loyalty*, is joining the board of advisors for *Loyalty360*, a professional association for loyalty marketers.

■ Auckland, New Zealand, research software company *Infotools* has appointed **Dugald MacDonald** as software development director.



MacDonald

■ Milwaukee research and consulting firm *Market Probe* has appointed **Michael Brereton** as a business consultant.

■ *Back to Nature Foods Company*, Naples, Fla., has appointed **Daniel Anglemeyer** as CMO.

■ Waltham, Mass., life sciences consulting firm *Trinity Partners* has named **Nason Russ** as a senior consultant in its Primary Market Research Group.

■ Baldwinsville, N.Y., firm *Research & Marketing Strategies Inc.* has hired **Andrew Clark** as the *QualiSight* team leader and named **Christopher Caver** as survey operations supervisor, a new position within the *RMS Healthcare* division.

■ Irvine, Calif., firm *MFour Mobile Research* has recently hired **Roger Nolasco** as senior systems administrator.

■ In London, research technology firm *FocusVision* has promoted Managing Director **Richard Collins**, who is now EMEA (Europe, Middle East and Asia) managing director for the company's quantitative and qualitative solutions.

■ Montreal-based research company *iPerceptions* has named **Lane Cochrane** as chief analytics officer and **Derek Zakaib** as CMO.

■ U.K. research agency *Future Thinking* has appointed **Alex Lomizov** as head of analytics for its *Analytics Hub* brand.

■ Honeoye Falls, N.Y., research firm *KJT Group* has hired **Johan Mohd Sani** as research manager.

■ *Imperium*, a Westport, Conn., provider of data quality and anti-fraud solutions for the marketing research industry, has appointed **Jennifer Weitz** as vice president, business development.

■ In Dallas, *Dickey's Barbecue Restaurants Inc.* has appointed **Diana LaRocca** as CMO.

■ New York location-based mobile advertising firm *Verve* has appointed **Tim Gough** as vice president of insights and analytics and **Bryan Throckmorton** as vice president of enterprise data.





■ *Colliers International* | Chicago, part of commercial real estate services firm Colliers International, has added **Craig Hurvitz** as vice president of market research. He will be based in the company's Rosemont, Ill., office.

■ In New York, researcher *GfK* has appointed **Laura E. Wendt** as executive vice president, media, for the Consumer Experiences and Consumer Choices organizations in North America.

■ U.K. airline *easyJet* has appointed **Alberto Rey-Villaverde** as its first head of data science to accelerate its use of artificial intelligence.

■ In Irvine, Calif., frozen yogurt franchise *Yogurtland* has appointed **Tim Fuhrman** as director of marketing.

■ Nashville, Tenn., tire and rubber company *Bridgestone Americas* has promoted **Amber Holm** to vice president of brand marketing, U.S. and Canada, consumer replacement tire for *Bridgestone Americas Tire Operations*.

■ *Dapresy*, a Sweden-based research software firm, has named **Alexander Skorka** as COO. He also retains his position as managing director for *Dapresy's* DACH Region (Germany, Austria and Switzerland).

■ **Walter L. Good** has been named president and member of the board of directors of *Emeryville, Calif., PinPoint Research*.

■ In New York, research consultancy *Smarty Pants* has hired **Julie Katz** as insights Jedi.

■ U.K. digital research agency *ResearchBods* has appointed **Robert Webster** as client services director.

■ Minneapolis-based product lifecycle company *Logic PD* has hired **Shawn Oreschnick** as director of analytics and research services.

■ San Francisco market intelligence firm *Ask Your Target Market* has appointed **Sandy Janzen** as its director of client engagement, a newly created role.

■ *Copal Amba*, a London-based research and analytics firm, has named **Damian Burleigh** as managing director-head of sales and marketing.

■ *Lowe's Companies Inc.*, Mooresville, N.C., has promoted **Marci P. Grebstein** to CMO and **Erin K. Sellman** to senior vice president of strategy, insights and planning.

■ The *Mobile Marketing Association*, New York, has added the following

new members to its global board of directors: **Pete Blackshaw**, global head of digital marketing and social media, Nestle; **Susan Canavari**, chief brand officer, JP Morgan Chase; **Sanjay Gupta**, executive vice president – marketing, innovation and corporate relations, Allstate Insurance Company; **Peter McGuinness**, chief marketing and brand officer, Chobani; and **Andrew Sherrard**, CMO, T-Mobile. **Stephen McCarthy**, CFO, xAd has also been appointed as new treasurer.

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# Q

## Research Industry News

### News notes

■ **Cerebral Diagnostics Canada Inc.**, a Toronto-based start-up, has been issued patent No. 9,179,854 from the U.S. Patent and Trademark Office for the firm's brain imaging technology, Dynamic Electrical Cortical Imaging (DECI).

■ The **CBS Television City Research Center**, located inside the MGM Grand Hotel in Las Vegas, welcomed its millionth visitor in November. The visitor, Latoya Washington of New Jersey, participated in a new television series study and, to mark the occasion, received an array of television and Vegas-themed giveaways from the CBS Research Center and the MGM Grand Hotel.

### Acquisitions/transactions

■ Sterling, Va., information services company **Neustar** has entered into a definitive agreement to acquire **MarketShare Partners LLC**, a marketing analytics technology firm based in Los Angeles.

■ **The Stagwell Group**, Washington, D.C., has signed an agreement with **Nielsen** to acquire **National Research Group**, a Los Angeles research and consulting services firm. It will operate as an independent

entity under the umbrella of the Stagwell family of companies.

■ New York marketing communications firm **J. Walter Thompson Company** has agreed to acquire a majority stake in **Clartag**, a digital marketing consultancy based in Beirut.

■ Jersey City, N.J., firm **Verisk Analytics Inc.** has acquired **The PCI Group**, a consortium of five specialist companies that offer integrated data and subscriptions research. PCI will become part of Wood Mackenzie, a Verisk Analytics business.

■ **GfK**, Nuremberg, Germany, has agreed to sell its global animal and crop health division to a consortium consisting of private equity investor **Inflexion** and the current management led by Stephen Hearn.

### Alliances/strategic partnerships

■ Salt Lake City customer experience firm **InMoment** has partnered with U.K. video feedback firm **Voxpopme** to provide InMoment clients with a range of video capture and analytics capabilities integrated across InMoment's voice of customer platform.

### Association/organization news

■ **The Marketing Research Education Foundation** has given an \$8,000 emergency grant – \$3,000 of which was supplied by conference organizer **IIR** from proceeds from **The Market Research Event** – to the Children of Hope School in Thomazeau, Haiti, to be used to temporarily fund its daily operations while it gets a permanent operating grant in place after unexpectedly losing its primary donor.

■ **ESOMAR** and the **Global Research Business Network** (GRBN) have updated the ESOMAR/GRBN Guideline on Online Sample Quality, which

explains how to apply principles of market, social and opinion research in the context of the current legal frameworks and regulatory environments worldwide.

### Awards/rankings

■ Boston-based market intelligence firm **InCrowd** has achieved national ranking on *Entrepreneur's* Top Company Cultures list, a ranking of U.S. businesses exhibiting high-performance cultures, created in partnership with culture management software and service provider CultureIQ.

■ **Research & Marketing Strategies Inc.**, Baldwinsville, N.Y., has been ranked one of the 14 largest patient-satisfaction measurement firms in the U.S. by *Modern Healthcare*.

■ **Ruth Stanat**, founder and CEO/president of New York-based **SIS International Research**, was recently named Circle of Excellence CEO Award Finalist in *SmartCEO* magazine.

■ **Michelle Andre**, vice president of marketing for Fishkill, N.Y., firm **Virtual Incentives**, has been named the winner of a Stevie Award in the Executive of the Year category in the 12th annual Stevie Awards for Women in Business for her leadership work in developing integrated marketing campaigns with measurable ROI.

■ Stamford, Conn., research technology company **FocusVision** was recognized as a gold level award winner at the Annual 2015 Golden Bridge Awards for Company Growth of the Year.

■ London-based research firm **Hall & Partners** and U.K. insurance company **Direct Line Group** have won the 2015 TMRE EXPLOR Award for their case study on The Hub, a data integration and publishing platform. The award is for innovation in marketing research, with particular



[quirks.com/articles/2016/20160113.aspx](http://quirks.com/articles/2016/20160113.aspx)

focus on new technology and methods that enhance and advance the research and insights process.

### New accounts/projects

■ **Kantar Media**, London, and **TNS Gallup** have been awarded a new contract for the provision of TV ratings by the **Danish TV** audience measurement steering committee. The service will run for five years initially from 2017, with the option to extend until 2024.

■ Portland, Ore., media measurement firm **Rentrak** has signed a group-wide contract expansion with **Sinclair Broadcast Group Inc.**, Hunt Valley, Md., for audience measurement services for all stations and markets in its portfolio.

■ **The Broadcasters' Audience Research Board**, a London-based TV audience measurement body, has agreed to prototype fusion contracts with **Kantar Media**, London, and **Nielsen**, New York, for Project Dovetail, its cross-platform measurement solution.

■ U.K. agency **DJS Research Ltd.** has been selected to conduct a market research project on behalf of the **Welsh Rugby Union (WRU)**. As part of the study, the firm will engage with both rugby union players and non-players in order to understand how the WRU can increase participation in rugby with a view to growing the number of people playing rugby in Wales in the longer term.

### New companies/new divisions/relocations/expansions

■ **SeeLevel HX**, a business intelligence firm based in Atlanta, is the new brand name for the integrated companies comprised of **Mystery Researchers**, **Insula Research** and **Beyond Hello**.

■ **Yahoo** is investing \$20 million to expand its data center in La Vista, Neb., by about 20,000 square feet.

■ **The U.S. Census Bureau**, along with **University of Nebraska-Lincoln** officials, have opened the **Central Plains Research Data Center** in Nebraska, which joins 20 other federal statistical research data center locations in the U.S. The centers provide qualified researchers on approved projects with a connection to restricted data collected by the Census Bureau, the National Center for Health Statistics and other federal agencies.

■ San Francisco-based online survey software firm **QuestionPro** has opened a new office in Munich. Additionally, the firm is partnering with Hamburg, Germany, social networking site XING, allowing XING premium users to use QuestionPro's Professional Feature sets for free.

■ London-based media agency **MEC** is launching MEC Tonic, a division that will bring tech-first solutions to clients via start-ups and early stage companies. The new division will drive marketing transformation by helping brands use emerging technology at the points in the customer journey that have the biggest impact on purchase decisions. It will be led by Hannah Blake, direc-

tor of open innovation at MEC.

### Research company earnings/financial news

■ Portland, Ore., research firm **Rentrak** has reported total company revenue of \$32.8 million for the fiscal 2016 second quarter, up 30 percent from the same period last year.

■ Stamford, Conn., researcher **Gartner** has reported total revenue of \$500.2 million for third-quarter 2015, a 6 percent increase over third-quarter 2014 and 13 percent excluding the foreign exchange impact.

■ Mumbai, India, researcher **MRSS India** has reported its financial results for the first half-year ending September 30, 2015. During the first half-year, operating revenue for the company was Rs. 53.9 million, compared to approximately Rs. 55 million in the previous whole year 2014-2015.

■ Reston, Va., firm **comScore** reported third-quarter 2015 GAAP revenue of \$92.4 million, an increase of 13 percent compared to third-quarter 2014.

■ Sales in the first nine months of 2015 for Nuremberg, Germany, researcher **GfK** amounted to €1,118.6 million, a 6 percent increase over the same period of the previous year.



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# CALENDAR OF EVENTS

●●● can't-miss activities

**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.glcma.com](http://www.glcma.com).

**IQPC** will hold its Mobile Marketing Exchange event on **January 24-26** in **Santa Barbara, Calif.** Visit [www.mobilemarketingexchange-usa.com](http://www.mobilemarketingexchange-usa.com).

**MRS** will hold its Kids and Youth Research Conference on **January 28** in **London**. Visit [www.mrs.org.uk](http://www.mrs.org.uk).

**IIR** will hold its Media Insights and Engagement Conference on **February 1-3** at The Ritz-Carlton, Fort Lauderdale Hotel in **Fort Lauderdale, Fla.** Visit [www.iirusa.com/mediainsights/home.xml](http://www.iirusa.com/mediainsights/home.xml).

**The 2016 Pharma Market Research Conference (USA)** will be held on **February 3-4** at the Hilton Parsippany Hotel in **Parsippany, N.J.** Visit [usa.pharmamarketresearchconference.com](http://usa.pharmamarketresearchconference.com).

**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](http://www.ama.org/Pages/default.aspx).

**Unicom** will hold its Testing Showcase North conference on **February 11** in **Manchester, U.K.** Visit [www.unicom.co.uk](http://www.unicom.co.uk).

**The Merlien Institute** will hold its Qualitative360 Europe 2016 event on **February 16-17** at the Ramada Hotel Berlin Alexanderplatz in **Berlin**. Visit [eu.qual360.com](http://eu.qual360.com).

**The Pharma CI Europe Conference and Exhibition** will be held on **February 18-19** at the Paris Charles de Gaulle Airport Marriott Hotel in **Paris**. Visit [europe.pharmaciconference.com](http://europe.pharmaciconference.com).

**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](http://www.thequirksevent.com).

**AMA** will hold its 2016 Winter Marketing Academic Conference on **February 26-28** at Caesars Palace in **Las Vegas**. Visit [www.ama.org](http://www.ama.org).

**Unicom** will hold its Sentiment Analysis in Finance conference on **March 10-11** in **Singapore**. Visit [www.unicom.co.uk](http://www.unicom.co.uk).

**MRS** will hold its annual conference on **March 15-16** at The Grange Tower Bridge Hotel in **London**. Visit [www.mrs.org.uk](http://www.mrs.org.uk).

**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](http://www.conference-board.org).

**CASRO** will hold its Digital Research Conference on **March**

**29-30** at The Driskill in **Austin, Texas**. Visit [www.casro.org](http://www.casro.org).

**NMSBA** will hold its Neuromarketing World Forum on **April 4-6** in Dubai, United Arab Emirates. Visit [www.neuromarketingworldforum.com](http://www.neuromarketingworldforum.com).

**Strategy Institute** will hold its Fifth Annual Customer Experience Strategies Summit on **April 4-5** at the Ritz Carlton in **Toronto**. Visit [www.customerexperiencecanada.com](http://www.customerexperiencecanada.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](http://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.pmr.org](http://www.pmr.org).

**The University of Alberta International Institute for Qualitative Methodology** will hold its 15th Annual Qualitative Methods Conference on **May 3-5** in **Glasgow, U.K.** Visit [www.iiqm.ualberta.ca](http://www.iiqm.ualberta.ca).

**The Mobile Marketing Association** will hold the MMA Mobile Marketing Leadership Forum on **May 10-11** in **New York City**. Visit [www.mmaglobal.com](http://www.mmaglobal.com).

**AAPOR** will hold its 71st Annual Conference on **May 12-15** at the

Hilton Austin in **Austin, Texas**. Visit [www.aapor.org](http://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](http://www.limra.com).

**EphMRA** will hold its Health care Business Intelligence/Analysis Conference on **June 21-23** in **Frankfurt, Germany**. Visit [www.ephmraconference.org/home](http://www.ephmraconference.org/home).

**AMA** will hold its 2016 Marketing and Public Policy Conference on **June 23-25** at California Polytechnic State University in **San Luis Obispo, Calif.** Visit [www.ama.org/publicpolicy](http://www.ama.org/publicpolicy).

**NMSBA** will hold its Shopper Brain Conference on **June 23-24** in **Chicago**. Visit [www.shopperbrainconference.com/chicago](http://www.shopperbrainconference.com/chicago).

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To submit information on your upcoming conference or event for possible inclusion in our print and online calendar, e-mail Sara Cady at [sara@quirks.com](mailto:sara@quirks.com). For a more complete list of upcoming events visit [www.quirks.com/events](http://www.quirks.com/events).

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## 10 minutes with...

### Nancy Cox

*Consumer Understanding and Insights Manager  
Hallmark Cards*

#### **What do you feel is the biggest challenge for the MR industry? How does it impact your day-to-day work?**

I find it very interesting that the MR industry is priming itself with loaded questions – questions about challenges and even the death of MR. Innovations and advancements come from discontent and adversity, not when we're satisfied with the status quo. I'm not being Pollyanna – the media is inflating the so-called recession recovery. We are in tough economic times. Yet these are exciting times for MR. For example, mobile research may have killed the traditional grid question but now I can ask Mom to take a photo of her child's Christmas list – in seconds I get an accurate picture of 25 Lego items pasted onto a piece of construction paper. Mom wouldn't have listed all these items – she probably would have just typed in "Legos" – and I would have lost the richness of seeing the true picture. As a researcher, I'm extracting insights from photos not text. And – Bonus! – the photos inspire my business partners.

#### **What are one or two best strategies for marketing researchers to remain relevant to internal clients and their business needs?**

Lean into your natural talents. Don't brush off what comes easy for you but that others notice. I'm a person that a pal once described as "water" as he watched how people were naturally drawn to me and shared deeply personal stories at our neighborhood coffee shop. I lean into this at work by taking my laptop to work in natural conversation places such as our café – a natural place for "water" – or walk-thru library. I have a larger than usual cubicle opening – no door. I pick up my phone and I respond to e-mails even if I have to say, "Can't talk right now but I'm scheduling some chat time for us." Then I can hear each business partner's questions, fears, hopes, goals and frustrations. Now I have access to what every researcher needs to know most – their audience. Often I have an insight or story I can share right away. Always, those conversations inform my next research. Nothing is more influential than to come back to someone and say, "I heard you and I have something specifically for you." By listening carefully, you can also hear the way they want their data.

#### **Talk about a recent win for your insights team and what you learned from it.**

There's a pattern of sports metaphors in these questions – challenge, strategy, win – so if you let me brag a bit about our World Series-winning Kansas City Royals, I'm going to use their style of play as an answer. The Royals won by putting the ball into play and moving the line – not by one dramatic home run. That's how I see our team winning now at Hallmark and particularly on the topic of the Millennial market. Our approach is to continuously enrich the conversation about the multicultural nature of this market. NO company can claim to understand Millennials without understanding multicultural nuances including African-American, Hispanic and LGBT culture. In fact, I would add that you cannot understand the traditional Boomer market either as Boomers increasingly have multicultural in-laws, grandchildren, friends and communities. This is everyday work – moving the line of understanding in every corner of our company from hiring, product development, marketing, distribution, customer development, etc. In December, our internal newsletter featured a conversation between the African-American strategist of our multicultural center of excellence and myself. Our very candid conversation is an honest expression of how we work. We want to inspire "conversations not checklists" about our multicultural consumers.



*"Nothing is more influential than to come back to someone and say, 'I heard you and I have something specifically for you.' By listening carefully, you can also hear the way they want their data."*

Read the full interview with Nancy Cox at [quirks.com/articles/2016/20160122.aspx](http://quirks.com/articles/2016/20160122.aspx)



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