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QUIRK'S Marketing Research Review

Creating a health-literate approach

How Merck evolved marketing research processes to help patients better manage their health

SPECIAL SECTION
Experts in Global Research

March 2016
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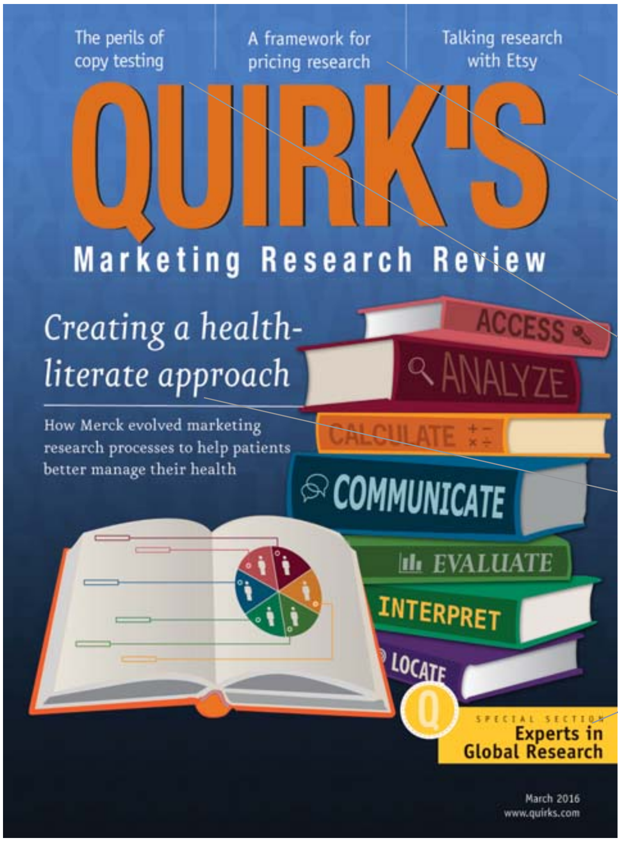
Quirk's Marketing Research Review
March 2016 • Vol. XXX No. 3



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••• Quirk's online

A quantitative look at Quirk's in 2015

Over the years, Quirk's has become much more than a magazine. From our e-newsletters, to our practitioner-driven blogs, social media accounts and directories, we work to provide you with quality, engaging content.

Every year around this time we take a quantitative look at the previous year to see how far we've come, set goals for the future and share our progress with you!

1,015,468	Total Web site visits in 2015
12.5	Percent increase in visits over 2014
2,852,304	Web site page views in 2015
71.9	Percent of visitors classified as new visitors
8,511	Total new subscriber accounts created in 2015
63,627	Marketing researchers in Quirk's database
72.1	Percent of subscribers receiving the magazine digitally or via mobile app
8,300+	Mobile apps downloaded
48,052	Deliverable and unique e-newsletter subscribers
21.5	Percent increase in e-newsletter subscribers from 2014
446	Number of articles published in 2015
44,839	Members of The Marketing Research & Insights Group, powered by Quirk's
10,600	Twitter followers

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••• customer experience research

Consumers cut ties after poor customer service

A survey by Milwaukee-based cloud communications firm Corvisa shows consumers are becoming fed-up with poor customer service and often cut ties with businesses as a result.

Nearly half (48 percent) of U.S. consumers surveyed said they have stopped doing business with a company because of negative customer service experiences in the past year, with nearly a quarter of Millennials saying they would stop doing business after just one negative interaction. Some customers said they have gone as far as yelling at the call-center agent (18 percent) or hanging up the phone (40 percent). The survey also shows that 41 percent of customers still rank phone calls as their top method of communicating with customer service, a number that increases to 56 percent when customers are frustrated. Seventy-eight percent of respondents would hang up if they had to wait on hold for more than 15 minutes, while a quarter would be lost at five minutes or less. Lowering hold times is an area the majority of respondents (57 percent) believe businesses can improve on.

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••• travel and leisure research

Vacationers use reviews but don't take time to post their own

A survey of U.K. adults by researcher TNS, per Biz Report, found that while many rely on reviews for travel planning few actually post them. The survey shows 15 percent of those surveyed would not book a vacation without first looking at reviews on sites such as TripAdvisor and 39 percent said they "generally look at some reviews" while 16 percent "sometimes" check out reviews. Twenty-eight percent said they paid "little attention" or "no attention" to reviews while researching travel. However, when asked how many post reviews about travel experiences, 11 percent said they did so "often" or "all the time" and more than half (56 percent) said they "never" post reviews and 11 percent "seldom." Older adults were more likely to post online reviews, with 13 percent of 35-to-54-year-olds doing so "all the time or often," compared with 10 percent of those age 16 to 34 and 9 percent of those over 55.

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Trade Talk

By Joseph Rydholm, Quirk's Editor

Study shows that the MR industry knows the problems facing it

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Joe Rydholm can be reached at joe@quirks.com

Last fall, research firm GfK and MR event producer the Institute for International Research released their joint study The Future of Insights, which drew on researchers' responses to questions surrounding three aspects of the profession: organizational challenges; current and future sources of data for insight creation; and gaps in the industry.

Far from being out of touch and slow to embrace change – charges that are often made against the industry by observers – the over-700 researchers who responded to the survey (315 on the client side and 394 suppliers) seemed to have very realistic views of the situation before them.

To the question "What is/will be the most important insight creation data source?" both now and two years out, the respondents in both camps were in agreement that passively-collected data will grow in importance, seemingly to the detriment of data gathered by "custom surveys in any mode."

While passive data and online surveys are the modes of the future, only 6 percent of MR professionals indicated they currently use passive data collection and 68 percent do not believe they will be using it over the next two years.

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As the report notes, "Thus, while the industry is ambitious in its desire to evolve with the consumer and tap into the score of behavioral data left behind by an increasingly plugged-in society, the ability to implement these new methodologies is still very much lacking and the industry is still reliant on the current state of data collection."

Based on conversations with client-side researchers and studies we have conducted here at Quirk's for recent editions of our annual Corporate Research Report, rather than a personal inability to change on the part of client-siders, that reliance seems to come from a number of factors outside of the researcher's direct control, namely the organizational culture in which they are working, the comfort level of their internal clients with newer methods and the still-unproven nature of some of the most cutting-edge approaches.

For a question on the topic of organizational issues they are currently facing and expect to be facing two years out, respondents were asked to allocate a total of 100 points among seven choices. (Generally there weren't large differences along client or vendor lines in assessments of the current and future impact of any of the factors.) For client-side respondents, budget limitations garnered the most points, at 21, as the issue they are currently facing, followed by the ability to generate actionable insights against business questions (16 points), people (skill sets, training) (15 points), ability to collect data needed to answer business questions (14 points), condensed timelines (13 points), ability to combine multiple data sources (13 points) and, in a distant last-place finish with eight points, regulatory or privacy concerns.

From a list of seven options, a combined total of 27 percent of client and supplier respondents singled out "integrating information from different sources to tell a story" as the imperative causing the biggest gap in the industry today, followed by "data quality" (17 percent) and "speed of insight generation to impact business decisions" (16 percent).

Know what needs to be done

As these study findings show, researchers are aware of their situations. They have a keen sense of the factors affecting their ability to succeed and they know what needs to be done. But real change doesn't happen overnight – it takes diligence and effort. While some observers would like the industry to change course like a speedboat, to me a more apt nautical metaphor might be an oil tanker – slow to turn but a formidable force once it gets going in the right direction.

IN FOCUS

••• a digest of survey findings and new tools for researchers

// Survey Monitor

••• food research

More than just gluten-free

Consumers see benefits beyond the obvious for gluten-free foods

Despite skepticism of gluten-free diets, Americans are consuming gluten-free foods more than ever before. New research from Chicago research firm Mintel reveals that nearly half (47 percent) of consumers agree that gluten-free diets are a fad, compared to 31 percent in 2013. What's more, one-quarter (25 percent) of consumers report that they consume gluten-free foods, a 67 percent increase from 2013.

A testament to innovation in the category, Mintel research shows that some 90 percent of gluten-free food consumers are satisfied with available gluten-free food options and 35 percent agree that the quality of gluten-free foods is higher than before – so much so that some Americans are willing to pay a premium for gluten-free options, including 26 percent of consumers who agree that gluten-free foods are worth their added cost.

When looking at the reasons why consumers gravitate toward gluten-free foods – aside from a gluten intolerance or sensitivity – Mintel research shows that consumers perceive foods with any free-from claim to be both healthier and less processed. Likewise, growth of gluten-free foods is driven by health concerns, with 37 percent of consumers reporting that they eat gluten-free foods because doing so is better for their overall health and 16 percent doing so because "gluten is bad for you." Another 11 percent of consumers eat gluten-free foods because a health care professional suggested they eliminate gluten from their diet.

Despite linking gluten-free foods to health, consumers who eat these foods for weight loss dropped from 25 percent to 19 percent 2014-2015, suggesting that consumers are more likely to view gluten-free products as a contributing factor to their overall well-being than simply as a weight-loss tool. This is evidenced by the 23 percent of consumers who report that they only incorporate gluten-free foods into their diet some of the time.

Skeptical attitudes toward gluten-free diets have done nothing to hinder sales of gluten-free foods, as the category has experienced growth of 136 percent from 2013-2015, reaching estimated sales of $11.6 billion in 2015. With over one-quarter (27 percent) of gluten-free food consumers looking for gluten-free labels on food packaging, gluten-free food sales exploded from 2.8 percent of total food sales in 2013 to 6.5 percent in 2015.

However, trust in gluten-free product claims has slightly decreased, with 45 percent of consumers trusting that products bearing a gluten-free claim are actually gluten-free, down from 48 percent in 2014. Another 45 percent of consumers agree manufacturers should not label products as gluten-free if they never contained gluten in the first place.

"While some consumers view the gluten-free diet as a fad and are looking for improved nutrition and ingredients in gluten-free foods, consumption continues to trend upward. Large and small manufacturers are entering the gluten-

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free category, increasing the availability, quality and variety of gluten-free foods while Americans display interest in incorporating these foods into their diet," says Amanda Topper, senior food analyst at Mintel. "However, since trust toward manufacturers' labeling of gluten-free foods has slightly waned, they should consider providing messaging about the steps taken to ensure their products are gluten-free to reassure consumers. Americans have come to expect brands and products to be transparent and trust that the items they purchase are as advertised."

When dining out, nearly three in 10 (28 percent) consumers with celiac disease are less strict about eating gluten-free foods compared to eating at home. According to Mintel Menu Insights, a quarterly census of U.S. food service venues, restaurants are expanding their gluten-free options to target these consumers: gluten-free as an ingredient claim on menus grew 127 percent from Q2 2012-Q2 2015 and is now the top nutritional ingredient claim.

Some 10 percent of U.S. restaurants tracked by Mintel Menu Insights feature a gluten-free menu, appealing to the 22 percent of gluten-free food consumers who are more likely to visit restaurants that have a specific gluten-free menu. Mintel Menu Insights also found that the number of items on gluten-free menus grew 9 percent from Q2 2012-Q2 2015, with gluten-free as a dish claim growing by 24 percent over that same period, making gluten-free the top menu item claim.

"While finding gluten-free foods away from home can prove difficult for gluten-free food consumers, there has been growth in gluten-free restaurant options as gluten-free diets have become more popular. In the past, it may not have been feasible for celiacs and gluten-free food consumers overall to find these foods at restaurants. Moving forward, there should be more expansive gluten-free menu offerings as the foodservice industry competes with retail for the rising number of gluten-free Americans," says Topper.

••• health care research

Boomers need to take better care of themselves

They know what they're not doing

Baby Boomers believe in the value of prevention but many of America's most influential generation are taking a reactive, and sometimes risky, approach when it comes to managing their health, as revealed by the first MDVIP Boomer Health Survey.

The national survey of 1,049 Baby Boomers, conducted by research firm Ipsos Public Affairs on behalf of MDVIP, a Boca Raton, Fla.-based physician network, shows that while 94 percent of Boomers believe preventive care is an important part of staying healthy, three out of four say they should be doing more to better manage their health (74 percent). Half of Boomers (46 percent) say they don't exercise regularly and more than a third say they don't eat healthy (35 percent) or get sufficient sleep (37 percent, seven to eight hours of sleep a night).

More than 75 million Baby Boomers – those born between 1946 and 1964 – are now living in the United States. This aging population is expected to live longer than their parents' generation but with higher rates of chronic illness which can lead to diminished quality of life in their later years. MDVIP commissioned the research to better understand Boomers' perceptions and concerns related to their current health and how primary care experiences are influencing their overall well-being.

What would motivate Boomers to get on a healthier track? Though 73 percent of those surveyed report suffering from a chronic health condition, almost half (43 percent) are playing the "waiting game," saying it would take an unexpected, life-threatening diagnosis for them to invest more in staying healthy. Additionally, 14 percent say a friend or family member's health scare would be an impetus for change. Other motivators are having an expert create a clear plan tailored to helping them achieve their health goals (28 percent) and having a strong support system of friends, family and mentors to encourage them (25 percent). About 17 percent claim nothing would motivate them, believing they have little control over their future health.

"The survey findings show that Boomers have a greater health consciousness than previous generations but also expose the discrepancies between what Boomers know they should be doing to stay healthy versus the reality," says Dr. Bernard Kaminetsky, medical director and a founding physician for MDVIP. "A health scare or serious illness is frequently the first wake-up call for people but many chronic conditions plaguing Boomers today – from diabetes to cardiovascular disease – are often preventable. This is where good primary care plays a key role, by helping patients identify their risk factors early and influencing the necessary lifestyle changes in order to mitigate, and even prevent, disease."

The gap between Boomer beliefs and behavior may be linked to shortcomings in primary care, with nearly half of the respondents (45 percent) reporting frustrations with their primary care experience. The findings revealed the top three frustrations about visiting their primary care physician are waiting while in the office to see the doctor

(32 percent), the limited time they actually have with the doctor (26 percent) and trying to get an appointment (18 percent).

In addition, 31 percent report that they typically spend more time sitting in the waiting room than they actually spend with their doctor; 28 percent say that they spend more time getting their car oil changed than they do with their doctor. Thirty percent have had to track down their doctor's office to get test results; 23 percent say their doctor isn't available when they need him/her. And many Boomers feel their doctor doesn't really know them, with 31 percent doubting their doctor would recognize them on the street.

More than a third (36 percent) have taken action as a result of these frustrations, including 27 percent who have changed or have thought about changing their primary care doctor.

For most Boomers, the actual experience of visiting their primary care doctor is a chore: 45 percent compare it to grocery shopping, 11 percent to airport security and 10 percent to waiting in line at Disney. Only a quarter (25 percent) say their actual experience is like talking with a trusted advisor. Eighteen percent compare conversations with their doctor to talking to a boss who is running late.

When asked what they would most value in their primary care doctor, 62 percent say visits that don't feel hurried and last as long as needed; 50 percent want a physician with a kind and compassionate bedside manner; and 39 percent want a physician who focuses more on prevention and wellness, not just treating them when they're sick.

"These insights highlight the increasing challenges of traditional, volume-based medicine that are driving more consumers to look for healthcare alternatives," says Bret Jorgensen, chairman and CEO of MDVIP. "Many people want and need a close relationship with their doctor, who knows them well, customizes a plan to optimize their overall health and has the ability to intervene and coach along the way. Data shows that patients who are actively engaged in their health and have better relationships with their doctor are achieving improved outcomes and better management of chronic conditions."

The MDVIP Boomer Health Survey was conducted August 25-31, 2015, via an online interview, in English, by Ipsos Public Affairs. The sample was composed of 1,049 U.S. adults between the ages of 51 and 69 who have a primary care doctor or have seen a primary care doctor in the past five years. An additional group of 407 Boomers were interviewed in the New York metro area. 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. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 3.4 percentage points for all respondents.*

••• lifestyle research

Our love-hate relationship with technology

It's awful but I can't live without it

As technology continues to seep into seemingly every aspect of everyday life – and with familiarity so often breeding contempt – it should come as no surprise that it rubs some Americans the wrong way. Many adults remain divided on how technology impacts the way we live our lives. On the one hand, strong majorities believe that technology has improved the overall quality of their lives (71 percent) and encourages people to be more creative (68 percent). But at the same time, strong majorities also believe technology is creating a lazy society (73 percent), has become too distracting (73 percent), is corrupting interpersonal communications (69 percent) and is having a negative impact on literacy (59 percent).

These are some of the results of The Harris Poll of 2,220 adults surveyed online between June 17 and 22, 2015.

On an encouraging note, a majority of Americans say technology has had a positive effect on their ability to learn new skills (63 percent). Over four in 10 also say technology has a positive effect on: their relationships with friends (46 percent); their ability to live life the way they want (45 percent); their happiness (43 percent); and their social life (42 percent).

A plurality says the same of its effect on their work productivity (36 percent) and their work life (35 percent).

While a plurality (36 percent) believes technology has a positive effect on their productivity at home, it's worth noting that nearly one quarter (23 percent) disagree with this sentiment.

It's well known that different generations hold differing opinions when looking at any aspect of technology – be it usage, adoption or general attitudes. Knowing that Millennials are traditionally the most attuned to their tech devices, it comes as no surprise that this group is more likely to say technology has had a positive effect on nearly all aspects tested, including: ability to learn new skills (72 percent vs. 59 percent Gen Xers, 60 percent Baby Boomers and 56 percent Matures); relationships with friends (59 percent vs. 46 percent, 36 percent and 34 percent), ability to live the way they want to (53 percent vs. 43 percent, 39 percent and 40 percent); happiness (52 percent vs. 42 percent, 37 percent and 38 percent); social life (57 percent and 42 percent, 30 percent and 29 percent); and relationships with family (46 percent vs. 36 percent, 33 percent and 27 percent).

However, there is a key exception – their productivity. Millennials are more likely than all other generations to say technology has had a negative effect on their productivity both at home (32 percent vs. 21 percent Gen Xers, 20 percent Baby Boomers and 14 percent Matures) and at work (14 percent vs. 8 percent, 3 percent and 2 percent).

While Millennials may be the most likely group to say technology positively affects their relationships and the most likely to say it enhances their social life (67 percent vs. 53 percent Gen Xers, 36 percent Baby Boomers and 40 percent Matures), their family and friends might feel differently.

Millennials also happen to be more likely than any other generation to say their friends/family think they use technology too much (46 percent vs. 27 percent Gen Xers, 13 percent Baby Boomers and 11 percent Matures).

Men and women offer some differing opinions on how technology affects their lives as well. Women are more likely than men to hold the negative opinions that technology has become too distracting (76 percent vs. 70 percent of men) and that it gets upgraded/updated too quickly (67 percent vs. 57 percent). They're also more likely to believe it has a negative effect on their productivity at home (30 percent vs. 17 percent) and safety and security (18 percent vs. 13 percent). However, women don't find it all bad. They're also more likely than men to say they use it as an escape from their busy lives (50 percent vs. 43 percent).

Meanwhile, men are more likely than women to see the positive aspects of technology on their lives. This includes their ability to learn new skills (67 percent vs. 60 percent of women) and to live life the way they want (50 percent vs. 40 percent). Men are also more likely to believe technology positively impacts their safety and security (45 percent vs. 34 percent of women), their productivity at home (44 percent vs. 28 percent), their work productivity (43 percent vs. 29 percent), and their work life (42 percent vs. 29 percent).

Despite many concerns, it's clear Americans still have a hard time unplugging. When faced with a list of technological devices and general life staples and asked how long they could live without each, majorities of Americans indicate that they could make it a week or less without Internet access (67 percent), a computer/laptop (60 percent), mobile phone (59 percent) or television (55 percent), with over two in 10 going so far as to state that they simply could not live without them (27 percent, 22 percent, 26 percent and 21 percent, respectively).

Just to add a dash of perspective, about four in 10 said they could only make it a week or less (or not at all) without caffeine (42 percent) or sex (39 percent), with roughly two in 10 saying they could not live without them under any circumstances (20 percent and 18 percent, respectively).

So what can Americans live without? Just over one-quarter (26 percent) say they could live without sex altogether, while just 23 percent say the same of their computers and 18 percent say the same about Internet access. In other words, more Americans say they can live without sex than say they can live without the Internet or their computer!

This Harris Poll was conducted online, in English, within the United States between June 17 and 22, 2015 among 2,220 adults (aged 18 and over). Figures for age, sex, race/ethnicity, education, region and household income were weighted where necessary to bring them into line with their actual proportions in the population. Propensity score weighting was also used to adjust for respondents' propensity to be online. All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate, including sampling error, coverage error, error associated with nonresponse, error associated with question wording and response options, and post-survey weighting and adjustments. Therefore, The Harris Poll avoids the words "margin of error" as they are misleading. All that can be calculated are different possible sampling errors with different probabilities for pure, unweighted, random samples with 100 percent response rates. These are only theoretical because no published polls come close to this ideal.

••• financial services

American investors have risky view of risk

Investment horizons may be too short

A focus on short-term financial performance and misunderstandings about the nature of investment risk may have an impact on American investors' financial well-being. According to a new TIAA-CREF survey, 36 percent of respondents look to one-year performance as the most important indicator of an investment's return, with an additional 16 percent looking to quarterly performance as most important. Nearly half (47 percent) have purchased a fund based on its performance during the previous year rather than looking at its performance over a longer-term investment horizon such as five or 10 years.

While investors continue to grapple with the challenges of market volatility, it's even more critical for them to understand key investment concepts around diversification, asset allocation, risk and returns. However, among those surveyed, 71 percent of American investors believe they can eliminate investment risk by having a diversified portfolio; in fact, while a diversified portfolio can help to manage investment risk, there is no way to eliminate it altogether. Similarly, although investors should maintain an appropriate level of risk in their portfolios, many are unclear about how that works: 53 percent think that higher risk guarantees higher returns.

All investors would benefit from better access to financial education on these topics. But for Gen Y, the challenges posed by unpredictable markets and their impact on investing decisions are even more pronounced. While 29 percent of all respondents misunderstand the nature of various asset classes, indicating that they believe that all investments offer the same level of risk, 40 percent of Gen Y report the same, and 64 percent of Gen Y think that higher risk guarantees higher returns.

Despite some misconceptions about investment performance, American investors have a clear picture of what they want from their portfolio. Two-thirds of investors believe it's more important that their portfolio allows them to achieve their life goals, such as funding a comfortable retirement or paying for a college education, versus one-third who place more importance on a portfolio that consistently meets specific investment criteria, such as a certain percentage return.

In order to achieve their objectives for their investments, however, investors need to ensure they are not taking actions that can undermine long-term performance. For instance, 36 percent of respondents say that market volatility is the most likely reason they would rebalance their portfolio – in contrast to most advisors' recommendation to ride out market fluctuations as part of a long-term investing strategy. Fewer say they are most likely to rebalance when most advisors would recommend – at a regular time of year like a birthday (21 percent) or after a life change such as marriage, the birth of a child or grandchild, or the death of a spouse (20 percent).

The survey was conducted by KRC Research from Oct. 7 to Oct. 12, 2015, via an online survey of 1,000 U.S. adults who are employed, who contribute to an employer-sponsored retirement plan or an individual retirement account, and who make or share in financial decision making for their household. The survey was not conducted among TIAA-CREF participants and the survey questions and responses did not reference or concern any TIAA-CREF product, service or client experience.

••• alcoholic beverages

Millennial drinkers thirsting for quality, authenticity

'Treat-seeking' on the rise

Ben Cooper of U.K.-based beverage news site just-drinks reports that the deep and sustained global recession has left its mark on consumers and, in particular, on how they make premium purchasing decisions. In the alcoholic beverages categories, the premiumization trend is once more fueling growth, according to a new just-drinks study. "The recession in the late-2000s changed the consumer forever, particularly young Millennials that became adults during that time," says industry commentator Richard Siddle in the report.

Post-recession consumers, the report continues, are "far more conscious of how and where they spend their money. It has made them risk-averse and keen to seek out ready-made solutions that make their lives easier and cheaper to navigate." While this does not by any means signify the end of the premiumization trend, it certainly qualifies it. The premiumization trend will increasingly be driven by "treat-seeking," with premium brands that market themselves to consumers as a treat, or for a special occasion, particularly well-placed for growth.

The tough years have made consumers "appreciate far more the experiences and the opportunities they have to treat themselves, their friends and family." The "search for the next thing to do, taste or drink" will drive premiumization across all main consumer product categories but particularly in alcoholic drinks, the report notes.

A growing trend towards moderation and greater health awareness on the part of consumers means a "less, but better" trend will be discernible but brands will have to work harder to persuade consumers that the "better brands" are worth the extra money. Factors such as provenance, tradition and a story they can relate to will be the key factors influencing consumer purchasing decisions.

The report details examples of more considered and conditional premium purchasing behavior across diverse drinks categories. For instance, while the overall beer sector remains in decline, countering that long-term trend is the continuing growth of smaller, higher-value categories such as world, premium, craft, keg, local, regional, flavored and specialist beers. "Combined, these are bringing new value propositions to a beer category having to cope with overall volume declines from its biggest players," the report states.

In the spirits sector, premiumization has long been a key driver and will remain the primary factor influencing all the main spirits categories, according to the report. However, to stand out in the future brands will need to demonstrate "far more depth to their story" if they are to connect with an increasingly knowledgeable consumer.

"Consumers, particularly younger Millennials, want to buy into products they can relate to and that are relevant to their lives, be it through the story, the traditions, its values and most importantly what the brand stands for," the report states. "Limited, exclusive and special editions are driving innovation and consumer interest right across the spirits category. It is also helping to push a wider range of spirits towards high-end consumers."

The importance of provenance and back-story will also mean a continued and increasing blurring between craft and premium products. Brands will aim to stretch and promote their products' craft and heritage credentials as far as they can. However, to stand out from all the noise, the report says, both newcomers and established players will need to have a genuine point of difference and be prepared to invest in consumer engagement, particularly through social media.

Indeed, it is not just in relation to product credentials that the premium consumer will grow more demanding. The report also suggests that as the premium spirits market is becoming ever more international, the online sales channel is becoming more significant. "We can expect this whole area of the spirits category to become more sophisticated with new tailor-made, bespoke and personal services being offered to high-spending consumers."

Big brands have already recognized the value and potential of marketing to high-end consumers online. A prime example of targeted online retail Web sites is Diageo's Alexander & James site which sells single malts, limited editions and new releases. Diageo is finding the consumer insights gained through the Web site are allowing it to understand better the needs and buying behavior of premium spirits drinkers.

Provenance and heritage have always been crucial elements in marketing premium wine but increasingly the premium offer in the wine category will go beyond just finding interesting products with a story behind them, with premium on-trade wines sales being increasingly driven by consumer demand for experience-led offers, winemaker dinners and themed wine nights. This in turn will boost the market for wines by the glass and the wider use of draft wine dispensing systems.

Online is also expected to become an increasingly important sales channel for wine, enabling retailers and producers alike to offer exclusive, niche and limited editions to engaged consumers.

IN FOCUS

Product and Service Update

••• social media research

Tool aims to predict brand performance

Draws from traditional, social media

In St. Louis, big-data analytics and insights company evolve24 has launched its Evolution Platform, which lets users derive insights to improve corporate strategy, marketing programs and brand planning backed by business intelligence. The firm's analytics, like Opinion, Reputation and Emotion, are intended to be predictors of consumer behavior and brand performance. The Evolution Platform uses these analytics to process all publicly available traditional and social media to collect, analyze and visualize data points, primarily from unstructured sources like blogs, forums, review sites and social media to help brands improve marketing ROI, manage business risk, understand influencer networks and make data-driven decisions.
www.evolve24.com

quirks.com/articles/2016/20160304.aspx

••• political research

Online voter panel from SSI debuts

Profiles on past voting behavior

Shelton, Conn., research firm SSI has launched the SSI U.S. Voter Panel, a new online voter panel that provides political researchers broad access to the attitudes, beliefs and opinions of American voters. Pollsters can also sample the online panel to provide additional insights into issues, trends, candidate perceptions and voter turnout. The panel has close to 1 million panelists and profiles members including attributes like voter registration status, congressional district, party affiliation and past voting behavior at the national, state and local levels. To coincide with the voter panel launch, SSI will continue to run its SSI Presidential Pulse program, which provides real-time checks on the opinions of the voting public on candidate favorability throughout this election year.
www.surveysampling.com

••• b2b research

Lightspeed GMI panel reaches IT pros

Categories such as cloud, security, virtualization

Warren, N.J., firm Lightspeed GMI has expanded its B2B sample offering by building a phone-recruited panel of IT professionals across the United States. Through screening, recruitment and quality-control methods, the firm validated recruits on their decision-making, knowledge and familiarity for multiple technology categories (i.e., cloud, security, virtualization and others). B2B panel members are profiled on a number of points, including primary job function, industry, company size and more.
www.lightspeedgmi.com

••• television research

Nielsen adds Facebook component to Twitter TV Ratings

Includes posts shared with friends and family

Nielsen, New York, will be expanding Nielsen Twitter TV Ratings to include Facebook conversation. The expanded set of metrics, now called Nielsen's Social Content Ratings, will measure program-related conversation on Twitter and Facebook and include posts shared with friends and family, with followers and publicly. It will also track social media conversation for original video programming from TV and over-the-top streaming providers for linear airtimes as well as on a 24-hour-a-day, seven-day-a-week basis.
www.nielsen.com

••• Briefly

■ Medialets, a New York-based mobile ad server, has integrated its ad trafficking platform, Servo, with New York researcher Millward Brown Digital's Ignite Network, enabling advertisers and agencies to serve mobile ads across all ad formats, including video, and to accurately measure the effectiveness of mobile campaigns.
www.medialets.com

■ Zurich-based passbrains has added

digital assurance services to its crowdtesting offerings, allowing enterprise customers to explore, evaluate and rate transactions and touchpoints throughout the ordering, payment and delivery processes, including the return of goods, complaint management and customer support.
www.passbrains.com

■ In New York, enterprise data and analytics company Acxiom has expanded its TV advertising capabilities, making it easier for partners to use first-party and third-party data to reach consumers with relevant messages across TV platforms. These enhancements were fueled by the acquisition late last year of the Audience Interconnect television data platform from Allant.
www.acxiom.com

■ U.K. mobile survey software platform OnePoint Global has launched SMS invites, a global service used to improve response rates for mobile Web and online surveys. The service is free to sign up and allows clients to send SMS invites to 160 countries.
www.onepointglobal.com

■ Shelton, Conn., researcher SSI has teamed up with Boston-based mobile intelligence firm SessionM to introduce a new panel application called mTHOUGHTS. Members of SSI's mTHOUGHTS program will earn SessionM's loyalty currency, mPLUS Rewards, by participating in surveys and location-based activities like retail store audits. The app works on Android and iOS phones and tablets.
www.surveysampling.com

■ New York researcher Millward Brown has launched Digital Behavior Analytics, an analytics solution that gives businesses access to insights on brand health and marketing campaign performance, using data from search patterns and social media conversations.
www.millwardbrown.com

■ New York brand intimacy agency MBLM has released BrandOS 2.0, a brand management platform designed for companies to manage their brands.
mblm.com

■ Franklin, Tenn., firm Harpeth Marketing has released *Think Before You Act: 6 Unique Ways to Be Strategic about Growing Your Business*, a 14-page e-book that can be downloaded for free from the company's Web site.
www.harpethmarketing.com

■ U.K. research video platform Voxpopme has launched its on-demand video feedback app in Australia. The Voxpopme platform already enables Australian companies to add open-ended video questions into any survey but the addition of the mobile app will provide access to fast turnaround video research from the company's Australian community. Clients can now target this community to run video Net Promoter Score campaigns, ad testing, ethnographies and more to capture short selfie-style video responses.
site.voxpopme.com

Is your brand moving in the right direction?

| By Joe Abruzzo

snapshot

A review of an alternative set of approaches for understanding when corrective action is required to improve brand health.

Tracking research is an important means of monitoring brand health. How is the brand tracking on measures like unaided or total brand awareness? Consideration? Brand preference?

We are interested in levels and trajectories across a range of brand health metrics. How healthy is the brand? Where is the brand headed?

The problem is, brand health tracking measures tend to move slowly. Variation that accompanies smallish samples clouds the brand health picture. It's difficult to decide when it's time to celebrate or begin to take corrective action.

When working with survey data, it's a good idea to understand what is being reported. What time interval does the data represent? How often is the data captured? Is the data being captured continuously? One week per month? One month per quarter? How many interviews represented by each data point?

Some data providers choose to "roll" their data, which means creating a moving average that reduces sample bounce and introduces stability into data trends. This may seem like a great idea. However, the individual data points are not independent. A three-month moving average means that each data point is only one-third current. Changes from one month to the next are dampened. Emerging trends may be obscured. A data set with discrete data points where each data point is independent of all previous data points helps to avoid such a problem.

Active investors in the stock and commodity markets deal with these kinds of decisions every day. Many use simple tracking systems that generate buy-and-sell signals, or, at the very least, indicate when to pay attention.

It's common to track stock and commodity prices in comparison to the highest and lowest price observed over the most recent 52-week interval (referred to as a 52-week channel).

We can adapt this thinking to brand tracking. Imagine the feeling of breaking through to a new 52-week high on unaided brand awareness – or the disappointment of breaking through to a new 52-week low. These are two clear signals that brand health may be improving or in trouble.

The chart in Table 1, based on unaided brand awareness data for five brands, applies the same thinking to 12 months of tracking data. Red-colored cells represent new 12-month high values, suggesting improvement in brand health. (Green coloration would be used to represent new 12-month low values.)

A second, less well-known method of analyzing movement in brand tracking measures makes use of crossover moving averages.

Imagine a moving 52-week average on a brand-health measure like unaided brand awareness. Is the 52-week average trending upward? Or is it declining? Attention is suggested when the 52-week moving average is trending down.

Imagine a shorter 13-week moving average. In comparison to a 52-week moving average, a 13-week moving average will show greater variability – but reflective of shorter-term

quirks.com/articles/2016/20160305.aspx


In the complex world of healthcare research,
Experience
Matters.

Figure 1

New Highs/Lows	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Brand 1	46%	46%	48%	44%	43%	45%	55%	48%	50%	49%	49%	47%
Brand 2	64%	74%	72%	72%	66%	69%	66%	72%	70%	71%	70%	71%
Brand 3	62%	66%	71%	72%	67%	71%	68%	72%	66%	65%	64%	71%
Brand 4	43%	43%	43%	49%	46%	44%	53%	45%	49%	50%	46%	46%
Brand 5	38%	39%	37%	42%	39%	37%	41%	40%	39%	43%	37%	42%

Figure 2

Crossover Averages	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Brand 1	99	99	99	98	96	94	100	105	108	104	103	102
Brand 2	97	98	101	104	101	99	97	99	100	102	101	102
Brand 3	98	96	98	103	103	103	101	103	101	100	96	98
Brand 4	99	100	97	100	102	102	104	104	107	104	104	102
Brand 5	108	109	103	105	104	104	103	103	104	104	101	102

trends. Comparing the 13-week moving average to the 52-week moving average provides an indication of change in direction.

When a 13-week moving average moves above a 52-week moving average, we have an indication that the brand-health trend is improving. When a 13-week moving average moves below a 52-week moving average, we have an indication that brand-health may be weakening. This methodology provides an early indication of emerging strength or weakness.

The illustration in Table 2 shows an index of a three-month moving average vs. a 12-month moving average. Red-colored cells are an indication of improving brand health; green-colored cells are an indication of deteriorating brand health.

There are many other examples within finance of approaches for generating the equivalent of buy-sell signals that may be applied to brand health tracking research. (The reader may wish to check out *Technical Analysis in Commodities* by Perry Kaufman.)

Provides limited feedback

Tracking data, by itself, provides limited feedback to brand management. Given the very large investment required for tracking research, the steps outlined above provide valuable insights into brand health. Where are we? Are we headed in the right direction? Should we be taking corrective action?

The additional effort required for implementing the analysis approaches discussed above is small once the systems are in place. Microsoft Excel may be sufficient. The results are extremely useful for alerting management to reasons to take corrective action (or buy champagne).

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case study

health care research

Creating a health-literate approach

How Merck evolved marketing research processes to help patients better manage their health

| By Lisa R. Courtade and Laurie Myers

snapshot

Lisa R. Courtade and Laurie Myers detail the role of marketing research in Merck's drive to improve health literacy.

quirks.com/articles/2016/20160306.aspx

In seeking to connect more strongly with consumers, as a profession we in marketing research often turn to the next new method, from mobile to text analytics to neuroscience. However, our experience has shown us that there is also opportunity in refining existing approaches to achieve deeper, more meaningful and relevant customer insights. By thinking more broadly about our target health care consumer and including those with a range of health literacy levels, we have been able to improve our methods and deliver communications that are better understood by all audiences.

Nearly nine out of 10 Americans struggle with understanding health-related information. Health literacy is commonly defined as "the degree to which individuals have the capacity to obtain, communicate, process and understand basic health information and services needed to make appropriate health decisions."[1] Low levels of health literacy may span all age, gender, education and income groups. It can also be compounded by the emotional state of patients who are trying to grasp the implications of a new diagnosis. Patients and caregivers who struggle to understand health information have a difficult time following medical directions and are at greater risk for poor health outcomes. Low health literacy is linked to increased hospitalization rates, less frequent screenings for disease, increased rates of disease and mortality and poor adherence to treatment. "Health literacy is a stronger predictor of a person's health status than age, income, employment status and race."[2]

Numerous studies indicate that most health-related information is written beyond the level that the average adult can understand. As the Patient Protection and Affordable Care Act (ACA) extends health insurance coverage to millions of health care consumers,[3] more focus is needed to ensure that this growing universe of patients have the information needed to make informed health decisions. For many of

these patients, it may be their first time with health insurance coverage and they are just learning to navigate the health care system. Generally, people want to be healthy and want to take care of themselves but they don't always understand how. In addition to health care providers, pharmaceutical companies have an amazing opportunity to help empower patients to manage their own health through informative communications including patient labeling, educational materials and direct-to-consumer advertising. However, it is critical that companies engage with consumers in a way that is meaningful and understandable.

Until a few years ago, there was little recognition of the need to include respondents with low health literacy; moreover, common recruitment practices tended to underrepresent these populations. Random and convenience sample approaches, even when stratified for education, have generally resulted in the inclusion of few respondents who could be qualified as having limited health literacy. As we've learned, individuals with limited health literacy are harder to locate, less likely to participate in marketing research, are often screened out through standard exclusion criteria (such as age) and are not generally represented in recruitment databases.

Apply best practices in health literacy

In 2011, Merck made an organizational commitment to improve health literacy as part of our corporate mission to improve health. As we embarked upon achieving this objective, we partnered with leaders in the field of health literacy at Northwestern and Emory Universities. The goal of this partnership was to apply best practices in health literacy to optimize the development and testing of patient labeling, resulting in improved patient understanding and use. This partnership involved the creation of test materials that applied health literacy principles such as font size, spacing and simple language as well as the inclusion of limited literacy participants.

Very quickly we learned that filling these target samples was not an easy task. These individuals are generally less likely to be in recruitment databases and simply using lower education as a proxy for low health literacy was a poor predictor as it is not necessarily directly correlated. Through the partnership we were able to immediately adopt best practices from health literacy to locate and identify participants for our studies. Key tips we would offer to other researchers would be to:

- expand beyond typical facility lists by recruiting respondents from literacy, community and senior centers;
- offer paper copies of materials to respondents who do not have a computer;
- add a question during screening, "How confident are you filling out forms by yourself?"[4];
- use the Newest Vital Sign "ice cream label" assessment during research as a simple and reliable measure of predicting health literacy level, including numeracy skills.[5]

These measures enabled us to expand our sample composition to include a wider range of respondents inclusive of at least 10 percent to 25 percent low health-literate individuals with a minimal number of screening questions. As evidenced by Table 1 from an assessment of our pilot study results, about 30 percent of respondents had limited literacy. Along the way, we also learned to extend recruiting timelines to allow for nontraditional recruitment.

Provided many insights

The research process itself provided many insights that have become part of the best practices we now follow for testing patient labeling of new molecules. In our early studies, it quickly became evident that we could not simply add respondents with low health literacy to our existing market research methodologies and expect a reliable outcome. The survey-taking behaviors of this audience were notably different, which resulted in frustration for the participant, the interviewer and the client and at times led to inaccurate results. For instance, we observed that respondents with low health literacy often chose the first correct answer they encountered rather than reading through all options in a

Table 1: Literacy Levels Across Patient Education Levels (n=529)*						
	Some High School (n=41)	Completed High School (n=76)	Some College (n=191)	Completed College (n=142)	Some Post Grad (n=12)	Completed Post Grad (n=67)
Limited Literacy (n=158)	25	35	53	37	1	7
Adequate Literacy (n=371)	16	41	138	105	11	60

*Includes testing for six Med Guides/PPIs

Table 2: Average Comprehension Scores Across Education Levels (n=529)*						
	Some High School (n=41)	Completed High School (n=76)	Some College (n=191)	Completed College (n=142)	Some Post Grad (n=12)	Completed Post Grad (n=67)
Limited Health Literacy (n=158)	87%	88%	87%	91%	76%**	90%
Adequate Health Literacy (n=371)	87%	94%	96%	94%	93%	96%
Overall	87%	91%	93%	93%	92%	96%

*Includes testing for six MedGuides/PPIs
**It is our belief that the low comprehension in this cell is due to very small sample size and is not indicative of comprehension for limited health literacy respondents with some post-graduate education.

multiple response list where "all of the above" is an option. Qualitative inquiry demonstrated that respondents understood the information presented, it was the question sequence they struggled with; this resulted in an artificial decrease in overall comprehension scores. It was also painfully apparent that many tasks, including complex message-sorts, were overwhelming for many low health literacy participants. As a result, we have adopted a new practice of conducting a health literacy review to apply multiple best practices from the field of health literacy to not only the documents but also to the tasks and interview guides. Simplified language within the content itself is important but so too were clean layout and typography, descriptive graphics and clear tasks. (For more information see www.iom.edu/global/perspectives/2014/healthliteracyguidance.aspx)

This new, more health-literate approach has proven effective in multiple rounds of patient labeling research. As demonstrated in Table 2, we have consistently achieved strong comprehension (85 percent or better) among respondents with both limited and adequate health literacy. Health literacy experts agree this development and testing process is an optimal model for the design of clear, well-understood patient labeling.

Early on in our journey, and throughout, there have been questions regarding whether consumers or medical professionals who have advanced degrees would be offended by the everyday language and simple presentations foundational to health-literate communications. This has not been the case. Well-educated respondents have shared that they appreciate the clarity of the information, because often health information is complex and overwhelming, particularly during times of emotional stress. Moreover, it has been noted that the new format is helpful to these more educated audiences as a caretaker of other family members and to physicians in communicating with patients.

Patients should be empowered

As a pharmaceutical company, achieving our mission is about more than discovering the molecules that can help make people well. It's also about improving people's capabilities to make healthy choices, manage their therapies and navigate health systems. Patients should be empowered to manage disease through a better understanding of treatments and prescribed medicines. Health literacy is a critical factor in this understanding. Without it, the chances that a patient will correctly use and fully benefit from our discoveries are slim. At a time when patients and family members are increasingly involved in their own care, clear communication at every point along the patient journey, from researching symptoms to seeking diagnosis to managing disease, is a crucial adjunct to the medicines we discover.

We will continue to partner with patients and their caregivers to promote their understanding of their medical conditions or diseases, the reasons they are being treated and the appropriate use of medications and other treatments. Through this work, we have learned that engaging patients across a range of health literacy levels and incorporating their feedback through advancing our marketing research approaches helps us produce clear, effective health communications.

We are currently working to expand this inclusive, simpler approach to other types of consumer market research by ensuring the consistent application of best practices for health literacy in screening and testing across the business. We also continue to work with market research agencies, facilities and recruiters to improve their ability to identify and engage patients with limited health literacy. We are the first to admit that it is not a science yet and each study reveals new things we have not yet thought of or faced.

Viewed as a model

We believe that our health-literate approach to consumer research may be viewed as a model that could be adopted by the FDA, other pharmaceutical companies, other organizations in the business of health care as well as health systems that generate patient-facing communications. In October 2014, we shared our story in a panel presentation, "Addressing the health literacy challenge through 360° collaboration" at the PMRG Institute in New Brunswick, N.J. Compelled by the impact we had with our research process and the importance of our mission, the PMRG has since adopted health literacy as a key advocacy initiative. The goal of the PMRG initiative is to further the education of marketing research practitioners and to evolve our practices as an industry. The authors welcome additional dialogue and ideas. We invite you to join in the cause to grow and change our marketing research insight process to include and enable patients of all levels of health literacy to understand and better manage their health.

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3 www.hhs.gov/health care/rights

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brand research

case study

Back to the future

Old-school survey research in a big data-obsessed world

| By Eric Whipkey

snapshot

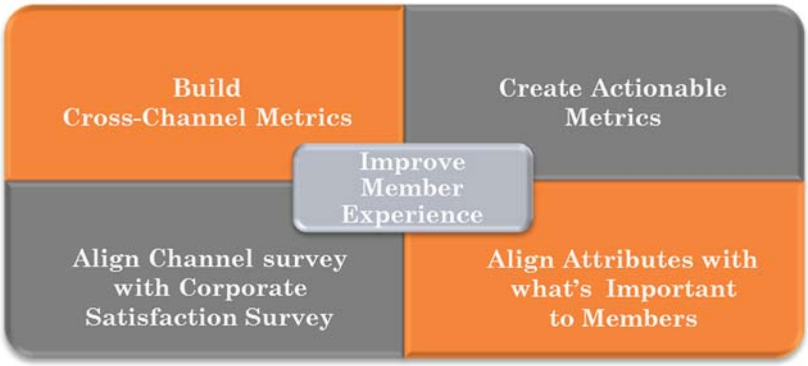
Navy Federal Credit Union's Eric Whipkey charts his experiences with updating legacy member satisfaction survey programs, largely with traditional research methods.

Big data is here and the survey is going the way of the dinosaur – or so says the business press as well as many researchers on both the client and the supply side. Despite all the dystopian tales of the future of research, when it comes to member experience measurement and tracking there is still room for an old-school blended research approach (qualitative followed by quantitative).

Since 1933, Vienna, Va.-based Navy Federal Credit Union (NFCU) has grown from seven members to over 6 million members. It provides financial products and services to active duty, reservists and other associated military personnel. I recently completed a total revamping of NFCU's corporate satisfaction/experience survey and channel-focused transactional experience surveys. Basically, the legacy corporate satisfaction survey had many individual questions and attributes. Based on R^2s associated with the key drivers from that study (and client questions), we wondered whether we were asking the right questions.

We are fortunate to have a stable

Figure 1



of strong qualitative researchers and we decided to undertake a realignment study starting with a robust set of focus groups. Our qualitative research explored the meaning of some of the known key drivers and illuminated new areas of focus. Since we knew that the existing key drivers were important to the member experience, we asked members what these constructs meant to them: support your lifestyle; consistency; accuracy; quick service; interactions; solving problems; "we care."

After developing a very comprehensive list of potential new survey items based on the outcomes from the first two focus group locations, we moved on to the next market for a few more groups. We tested these new items with these groups to ensure they were on target and in the members' words. The result was a robust set of seven survey dimensions (groups of questions) that described the member experience. These were later narrowed down from 50 new attributes to closer to 40 attributes.

Focus groups were followed by a three-month pilot test during which we utilized reliability analysis (Cronbach's alpha) and factor analysis to reveal three separate dimensions around the construct of "making things easy." These three dimensions were totally new concepts that had not been part of the survey in the past. Further factor analytic techniques also confirmed that three other dimensions fit together into one primary construct that we called "doing things right."

After the second pilot month, we were able to reduce the number of survey questions per dimension to a total of 26 dimension-based attributes.

The final dimensions were formulated using both exploratory and confirmatory factor analysis and included "doing things right" (consistency, accuracy, quick service) and "ease of doing business" (interactions, solving problems, "we care").

We did have some external assistance with this part of the work. Our research partner ran the confirmatory factor analyses and a structural equation model (SEM) using Mplus. It was a rather painstaking, iterative process but it was worth it to get to a concise model that was both intuitive and easy to explain to leadership.

After finalizing this more streamlined survey, we have collected a full year's worth of monthly data, which now also includes channel- and product-based satisfaction ratings. We have since finalized the SEM and identified one clear path to "strong member experiences." During our survey development process, we also managed to add new KPIs, including an overall "ease of doing business" measure, a "switching" measure and embedded measures (within the dimensions) which together covered most components of the predominant secondary research satisfaction and experience frameworks that we were tracking or planning to track.

In the end, our corporate satisfaction model tells a nice simple story, despite its inherent complexity and the layered insights it provides. We find that to engender satisfaction, advocacy and perceptions of comparative ease of doing business, it is important to do three basic things, in this order: do things right, make things easy and provide products and services in the right format (i.e., channels and products).

Connecting it to the brand research

The price of entry appears to be a strong perception that your organization

Table 1

Questions	Quarter 1		
	Short Form		Full Survey
	Short Form 1	Short Form 2	Long Form
Q1	x	x	x
Q2	x	x	x
Q3	x	x	x
Q4	x	x	x
Q5	x	x	x
Q6	x	x	x
Q7	x	x	x
KPI	x	x	x
KPI	x	x	x

x	Actual ratings
x	Modeled ratings

properly supports your "prime target demographic" or your core constituency. This is consistent with the idea that your brand must act in a manner consistent with your target's expectations and needs. As we build this model out further, I envision connecting it to the brand research via some additional modeling work. At present, the model allows drilling down into the measured domains to better understand what is behind each concept and how members with different product/channel usage patterns respond.

In one example, we find that the less engaged a member is, the less satisfied they are across core model drivers, yet all follow the same path to satisfaction, advocacy and perceived ease of doing business. Having great channels and products will only get you so far in terms of loyalty, advocacy and measuring up to other organizations. First you must treat members right and provide them with processes/services that are easy to use, work with or get value from. Then they can best use the channels and appreciate the products and services. The beauty of this type of research is that we can really dig deep with the data we have to understand how to do all of these things. I have only gone two layers deep here but one can easily go further.

While we were building that corporate model, we also began exploring how this same model could work at the channel level (call-center and branch). The study started with our contact center and branch experience surveys. Like the general member satisfaction survey, these had been in place for some time and both consisted of individual attributes. Following the same approach described above, we looked at the existing survey and the current satisfaction drivers and asked: What might these mean from the perspective of members? What more might there be to these attributes? How might these differ in the context of the delivery channel (contact center, branch, retail store, online, mobile, etc.)?

We then asked our members in a series of focus groups and found that two of the dimensions were not relevant and one needed a name change. In addition, some of the attributes making up those dimensions needed to change slightly to be put into context but the core dimensions were the same. We discovered that we could track several layers of cross-channel information, including KPIs – some attributes relating across channels – as well as tracking the experience based on dimensions. At this point, we have taken what we learned from our members and crafted channel surveys which are now being piloted. Initial results are pointing to surveys with similarly-structured dimensions that will easily allow for cross-channel measurement across no more than 20 attributes. Thus we are set to have cross-channel metrics that are aligned with our corporate satisfaction measure, have attributes aligned with members' needs and provide actionable metrics that will help to improve member experiences (Figure 1).

Did take a long time

Yes, this did take a long time, especially considering the delays that were necessary as we socialized and gained approvals for the piloting of the new channel surveys. Keep in mind that all of these surveys required tracking in parallel with the old survey, which we were hoping to replace.

Replacing a measurement infrastructure takes time. We are being careful to ensure that the model is stable and significantly robust before we formally roll it out. As anyone who has ever been involved with tracking research knows, change needs to be introduced slowly and be carefully socialized. We are in the process of weaning our stakeholders off of that old tracking.

Working up to this point, we infused insights from the focus groups and later the survey development into targeted quarterly reports with the promise of new data to come. At the time of this writing we are now one month into our plan to field these new surveys in parallel for three months. Just as we did with the corporate satisfaction survey, we will use the collected data to apply factor analytic and reliability analyses (coefficient alpha) to winnow the number of questions per dimensions to no more than three or four. This should leave us with two short surveys of no more than five minutes in length. Following this pilot phase, we will finally be able to pull the plug on the old surveys and unveil the more robust new cross-channel metrics and dimensions.

I realize that the time needed to do this "old-school research" is one of the basic criticisms leveled against traditional research by the big data branch of our industry. I tend to agree that research does need to recognize the need to balance fidelity with time to complete. Our employers and/or clients are, after all, looking for quick results so that they can respond to market disruption and/or rising member expectations while maintaining a business advantage.

So yes, big data, agile research and other quick-to-the-boardroom approaches can actually help us to respond to the C-suite and/or speed up the innovation pipeline. In essence, these new techniques can buy us the time that we need to carry out these more thoughtful approaches and ask the questions that still need to be asked. Yes, we do still need to ask and listen to members. After all, the old-school research techniques are still best-suited to identifying the targeted needs (the whys) of members so that organizations can make the strategic moves needed to ensure stellar member experiences.

Likewise, data-modeling approaches can help these traditional surveys to be easier for respondents and quicker to field as well. For example, even as we field and finalize the contact center and branch surveys, we are still working to make the corporate satisfaction survey shorter without losing the power to reveal insights and improvements. We are exploring a new missing-data modeling approach that will allow us to field our monthly corporate satisfaction survey and eventually the channel surveys in short and long forms. With this process (Table 1), we will field the corporate satisfaction survey with one question from each of the seven core dimensions and our KPIs (an approximately 10-item survey). This short form will be rotated throughout each quarter with one fielding per quarter of the long-form or full survey (four times per year). Our research partner will then model the likely ratings for all questions, reconstructing our dimensions across each survey month.

What we lose in fidelity in the short-form months we should gain in response rates, slower burn rates on our survey universe and making better use of our survey tools.

Many things are changing

To me, we are in a time in market research where many things are changing but many other things are staying the same. I was on a call with a researcher from Forrester Research not long ago. She was researching the uptake rate of many of the new next-gen approaches. While she was finding many new angles on things like emotion research – one of the components of our survey model – there were still few actual client-side takers. Clients just are not finding this other stuff (facial recognition, implicit measurement, neuromarketing, etc.) to be easy to sell into their organizations and they are getting good, useful results with their existing approaches – surveys and text analytics (for sentiment).

That is where we are too, though I am happy to use the new stuff. Take for example what we are planning for the missing-data modeling. That has a lot of value in our organization and it is a pretty easy sell – as long as it does not sully our data quality.

The sci-fi stuff is just not there yet but I hope it soon will be. It sure looks like fun.

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pharmaceutical research

Breaking the mold of the 'classic' survey

Research gamification for quality pharmaceutical stakeholder insights

| By Brian Mondry and Leah Fink

snapshot

The authors report on their successful effort to update a long-term ATU physician panel study by gamifying the questionnaire.

Already popular in the marketing space, gamification is now seeing broader adoption in market research. Survey gamification is becoming a necessity in these days of declining completion rates and the propensity of some survey-takers to speed through questionnaires. To get higher completion rates plus more thoughtful responses on a questionnaire, you need to employ some aspects of gamification into your studies.

The term "gamification" refers to using game design and mechanics in non-gaming contexts, which for online surveys could include enhancements such as achievement badges, progress bars, avatars, virtual currency and respondent challenges.[1]

However, the use of gamification techniques in market research must go beyond just graphics. A truly successful gamified questionnaire puts respondents in a more interactive setting that will better engage their subconscious thinking and motivations, allowing them to think outside the box, give a less obvious answer and be more engaged in the survey-taking process. These benefits can extend across industries from consumer research to surveying physicians or patients in the health care sector.

Given the often sensitive subject matter we deal with in health care, there may be concerns about executing some of the more elaborate gaming tactics listed above. However, in most cases, it is perfectly acceptable to replace long, repetitive text- and grid-heavy survey formats with interactive visual response options and features for a more playful design; or creating story-like scenarios that set a more interesting and realistic context in which respondents answer questions; or formulating questions as problems or challenges using the logic of games, all while maintaining the integrity of the subject matter.

One often-used quantitative survey technique is the awareness, trial and usage (ATU). The objective of ATU surveys is to assess key performance indicators related to awareness, importance of various criteria, brand/product performance on these criteria and intent to use. Therefore, metrics resulting from an ATU are often incorporated into tracking studies.

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research

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Despite the key role ATU surveys play in analyzing and tracking performance, these surveys are known to have some limitations. Specifically, respondents (in particular those who are part of panels) have become very used to the standard survey format. These questionnaires are typically composed of large blocks of questions that are repeated frequently for different products/brands and for different indicators (satisfaction, importance, etc.). Therefore, frequent survey respondents may be answering automatically, not taking the time to carefully read all questions and response modalities.

In addition, traditional ATU survey design typically asks respondents to rate various attributes on a scale of 1 to 7. This type of rating system has been associated with country-level bias in scoring. For example, respondents in Spain are known to generally provide higher scores compared with their French and German counterparts.

When a client needed an update to its long-term ATU study completed by a physician panel, we worked with our sister company Lightspeed GMI to break the mold of "classic" surveys. This survey suffered from many of the standard limitations of ATUs: It was a multicountry survey used to track performance of very similar products. The same physicians responded to the questionnaire as many as three times per year.

To address the challenges, Kantar Health and Lightspeed GMI worked together to develop a new approach based on gamification techniques that would incorporate a questionnaire design to increase physician involvement.

The new survey design had three main objectives: improve physician engagement while responding to the survey; diminish country bias to better track aggregated data; and identify new strategic points of differentiation for our client's brand.

Improving physician engagement while responding to the survey

For this specific project, more than 80 percent of the sample responded to the survey three times a year. Therefore, the physicians were at great risk of speed-taking the survey. The first action taken to improve engagement was the removal of all grid-like question layouts. In the gamified survey, only one question appeared per page and physicians used a drag-and-drop function to respond for all products at the same time. Question labels were shortened and scales were personalized to make sure physicians read the questions prior answering. In the traditional ATU, physicians would rate overall survival and impact on quality of life on the same scale. Now, physicians rate overall survival on a scale of "longest" to "shortest" and impact on quality of life from "least impact" to "most impact."

Physician engagement was also addressed by creating a more interactive way of asking some standard questions. For example, a non-gamified survey might ask a physician respondent, "Approximately what proportion of your patients do you treat with the following regimens?" For a gamified survey, however, a series of questions designed to better engage the physician would be asked, such as:

- Which treatment would you be most likely to offer this patient?
- Can you predict the most popular treatment selected?
- Would you choose the same treatment?
- If not, which treatment would you personally have selected?

Diminish country bias to better track aggregated data

Prior to adapting the ATU questionnaire, each wave of research produced the same results: the Spanish physicians were more satisfied with all products. However, based on other sources of information, we knew this was not necessarily the reality. For satisfaction questions, replacing numerical scales ("Please indicate on a scale of 1-7 how each brand performs on response rate") with sliding scales ("Do these treatments increase response rate? Definitely not.....Definitely so") harmonized country data.

In addition to being more satisfied, in the traditional ATU survey, Spanish physicians also appeared to be more knowledgeable about all clinical trials and pipeline products, possibly out of worry that their competency was being tested. For questions relating to knowledge, the 1-7 scale was replaced by a four-item scale with short phrases: Not aware; Aware but not of details; Quite familiar; Very familiar. Each item had an accompanying visual logo. The results of this change were clear; all countries in the scope now had much more comparable answers, making it possible to aggregate country-level data.

Identify new strategic points of differentiation for our client's brand

In the case of this research, our client was facing a challenge of having a direct competitor with a very similar product. In the traditional survey format, differences between the two products were not always obvious, with the majority of physicians providing similar responses for both products. However, in the gamified version of the survey, physicians needed to place both products on a single scale using a drag-and-drop, therefore highlighting slight nuances in performance that were previously undetected on the seven-point scale.

Another change involved asking respondents to think about overall product satisfaction in a new way. Instead of asking them to rate satisfaction on the seven-point scale as they rated other criteria, respondents were asked how many stars they would give the product if they were to publish a guidebook for it.

While their rational mind may consider the two products identical with a score of six out of seven, if physicians picture a guidebook, they may be willing to give one product five stars and the other four stars. The new star rating gives the rare opportunity in quantitative research to assess subconscious thinking when making a decision between two similar brands.

Interactive and pleasant

In addition to yielding richer data, the newly gamified survey design made the ATU experience interactive and pleasant while increasing user engagement. We found that the new and dynamic presentation of questions actually increased physician involvement in the questionnaire. Time to complete the ATU questionnaire increased from 14 minutes for the classic version to 17 minutes for the gamified version yet physicians frequently mentioned that the new questionnaire "seemed shorter" or was "quick."

But gamification goes far beyond simply using nicer-looking surveys. A survey that yields data that can uncover hidden opportunities or challenges is predicated on having a strong questionnaire. A survey employing gamification does not mean just using the previous ATU survey and adding some graphics. The survey must be designed with the user experience in mind and the questions written in a way that takes full advantage of the new interface. Working to bring out the simplicity in the questionnaire makes the questions come alive with the design of the interface.

Has great potential

Gamification in the health care sector has great potential to unlock new insights into prescription rationale, allowing us to peek behind the curtain to learn physicians' reasoning. In addition, applying gamification techniques to patient surveys can unlock insights into how adherent they are (or aren't) to their medications, their side effects, their comorbidities and relationships with their doctors, thereby improving their experiences and health outcomes.

The days of long, repetitive, grid- and text-heavy surveys are coming to an end. In these days of short attention spans and always-on connectivity with the office that has expanded the workday beyond the traditional 9-5, we need to employ new strategies that maximize engagement with research studies as well as ensure those studies yield not only comprehensive but high-quality data. Better data leads to better insights and better insights lead to smarter business decisions.

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advertising research

New tests for new times

The perils of copy testing in today's advertising environment

| By Jeri Smith

snapshot

Jeri Smith explores why copy testing doesn't work as well as it should and outlines the challenges to making it more effective.

Advertisers spend millions of dollars copy testing ad executions before in-market launch, often testing in rough stages to avoid producing a commercial that could potentially be a weak performer. This research investment is widely regarded as prudent, to ensure that the investment isn't wasted on advertising that may not perform. However, for the copy testing investment to be sound, it has to result in good decisions – which means that the predictive metrics that are provided must be solid.

Unfortunately, the underlying principles upon which the major copy testing systems are built are no longer suited to today's advertising environment. This mismatch between how advertising works and what copy testing measures has resulted in predictive margins of error so wide as to be nearly unacceptable. Copy testing can identify some of the losers but it gives far too many ill-performing ads a passing grade, resulting in millions, even billions, in wasted ad dollars.

Advertisers who find that their in-market results do not reflect what they were led to expect are often left wondering why. Of course, what was tested is not always what was run but the changes made between the copy test and the in-market launch were designed for optimization. What, then, can explain weak in-market performance for ads that copy testing said would succeed?

Some say that there's too much else going on in-market to be able to connect predictions with results. As an industry, we need to be better than that – that's an excuse and not becoming to the credible researchers that we are.

Media consumption habits have changed

There are a number of reasons why copy testing doesn't work as well as we hope it will. Some reasons are related to how the advertising environment and consumers' media consumption habits have changed since copy testing was originally conceived and developed. Other

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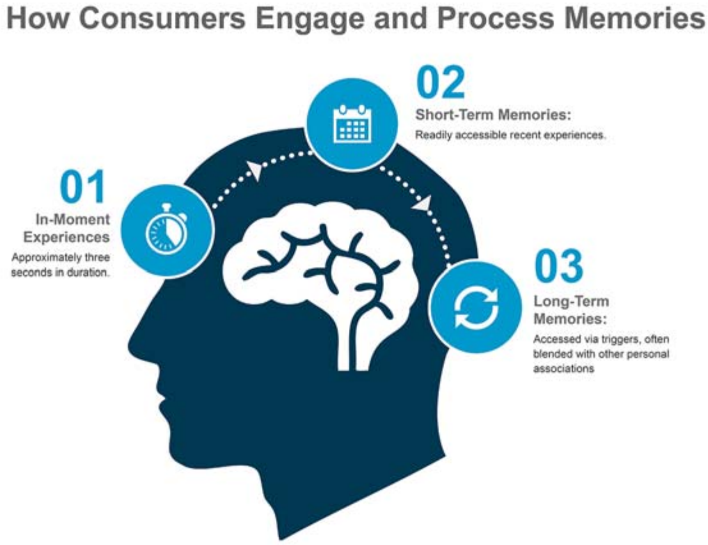
reasons are based on how the brain processes and stores advertising engagements; these realities have always been present but have become more important to get right as the clutter of brand messages has exploded in recent years.

When copy testing was first conceived, the focus was on the TV commercial. In earlier days, the typical advertiser produced a single commercial that represented the brand's total ad campaign. Sometimes that ad would get pooled out but typically this occurred later, after the initial execution had been run for a significant period of time. As such, it was entirely appropriate that the focus of testing was on the single commercial, how consumers received it and how it might affect the brand. (Figure 1)

Figure 1



If you start from the premise that the TV commercial is only one of a number of elements within your brand communications arsenal – and might not even be the first or primary one to which consumers are exposed – you might develop a very different testing approach.

Copy testing was also conceived when consumers sat on the couch and watched TV as a primary leisure activity. Of course, they didn't watch every commercial. And sometimes they had a bathroom or snack break or maybe they didn't leave the couch. Or maybe they just stopped paying attention when what was on screen no longer interested them. But they weren't flipping channels, they weren't watching pre-recorded shows and fast-forwarding through the commercial pods and they weren't engaged with a second screen while ostensibly watching TV.

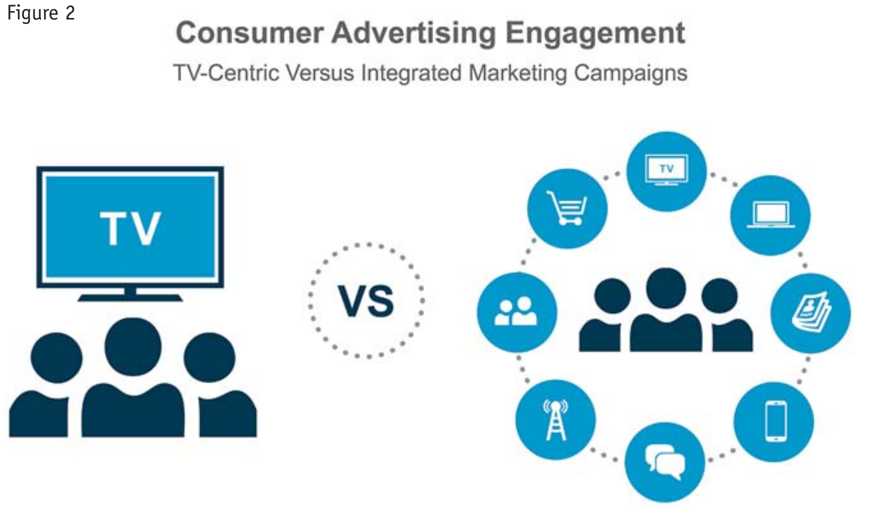
If your copy testing system starts from the premise that consumers aren't even looking at the screen, the way you test – and the commercials that pass the test – might be quite different than in today's forced-exposure copy testing world.

In other words, the world of advertising, and the world in which we advertise, has changed.

But now we get to what hasn't really changed, or at least not that much. Advertisers have always known, on some level, that what consumers can play back immediately after a forced exposure to a commercial may not be entirely predictive of what they will actually get out of seeing the commercial in a more real-life setting. In fact, early approaches that involved in-program commercial exposures and 24-hour (or longer) callbacks were designed to address this phenomenon. Later, clutter reels replaced the in-program exposures and the re-contact methodology was scrapped largely for reasons of cost and timing. Now, forced exposures, with or without the clutter reel, are followed more or less immediately by questions and algorithms that we have been assured actually predict how ads will work in-market.

But common sense, not to mention actual data, suggests otherwise. In fact, there are essentially three very different brain functions that come into play as people engage with and process advertising (Figure 2). In his book *Thinking Fast and Slow*, Daniel Kahneman contrasts the difference between how we experience an event in the moment and how we remember the experience afterwards. In-the-moment experiences are typically only held in the brain for about three seconds before being replaced by memories – in which the brain remembers only some aspects of what has occurred. In earlier years, researchers who intuitively understood that the actual experience of an ad is quickly replaced by the memory developed approaches to capture the experience – dials that consumers could

Figure 2



turn to register their liking or disliking, for example. More recently, the industry has embraced neuroscience and so-called "implicit" methodologies – studying brain waves and facial expressions to provide insights into the in-the-moment experiences of ads.

But as Kahneman tells us, the experience itself isn't what counts. What counts is what we remember. So while moment-by-moment analyses of commercials or other brand communications might be useful from a diagnostic standpoint, the insights gained cannot be relied upon to help us understand what consumers will take away from a particular ad – how it will be remembered (or not) and later acted upon (or not). Consequently, claims that the in-the-moment measures are in any way predictive of in-market success are highly suspect.

Our focus moves away

The more we move in the direction of reading how consumers are reacting as they watch commercials, whether using brain wave analysis, facial coding or other "implicit" methods, the further our focus moves away from what really counts – what consumers remember after the experience is over. Again, experiences and the memories of those experiences are different and in the case of advertising, what counts is the memory, not the experience.

This brings us to the third type of brain function: long-term memory. What a consumer remembers right after seeing an ad is held in the short-term memory. What was the ad about? Was it likeable? What brand was it for? What did it tell you about the brand? This is the main type of feedback that we receive about ads in today's copy testing environment. But short-term memories rarely come into play when consumers are making brand decisions. What comes into play – if you're lucky – is long-term memory.

Unfortunately for copy testers and those who rely on them, long-term memory is not simply an extension of short-term memory. Long-term memories are not even just slightly faded versions of short-term memories. Rather, they are often fundamentally different, as they are a blend of what was already in the consumer's mind, what other associations have occurred since the initial event and how the memory is triggered later. Long-term memories, in other words, have far more to do with personal beliefs and experiences – and more to do with all of the interactions that the consumer has with the brand and the category – than they do with any single experienced or remembered commercial engagement.

Predict and diagnose

When it comes to how the brain processes and acts upon advertising, copy testing focuses primarily on the experience itself and the short-term memory of the experience. How advertising actually works in-market involves mostly long-term memories. The primary challenge for copy testing when it comes to memory structure is not to get ever more deeply into the experience (other than to gain "diagnostic" feedback), rather to determine ways to predict and diagnose how ads and campaigns will shape long-term memories.

If you were to focus on building an understanding of how advertising builds the longer-term memories that shape brand perceptions, affinity and purchasing, the approach that you developed would likely be quite different than what we're using today.

So the fundamental shortcomings of today's copy testing systems revolve around: 1) what's tested (ads vs. campaigns); 2) a fundamental disconnect between how we test and how consumers engage with ads (or don't); and 3) how ad engagements are processed and stored.

Copy tests generally focus on three key performance metrics, all of which are affected by the dynamics described:

Breakthrough/attention/engagement: Because consumers don't behave as they used to, these metrics are less predictive than they should be. Further, we know that campaigns engage differently than single ads, creating more havoc when it comes to predicting engagement, particularly for new, undeveloped campaigns.

Branding: Subject to the same issues as breakthrough but also seriously impacted by the differences between short- and long-term memory structures and composition.

Claimed persuasion on the brand: Campaigns persuade on the basis of long-term memory. Monadic ad tests, along with a reliance on immediate response, translate into persuasion metrics that, more often than not, are not replicated in market.

That brings us to the diagnostics. If the diagnostics are designed to improve performance on predictive metrics that are not predictive, we end up improving for the copy test, not for the real world. If you religiously follow all of the diagnostic feedback that you receive, you'll end up with an ad that does better in a re-test scenario. But if the copy test metrics never actually point in the right direction on the basis of what's actually going to happen in-market, the time and dollars spent changing your ad – and making it better fit the formulas of how advertising is supposed to work – have not necessarily even improved it.

Stop tinkering around the edges

As an industry, it's time to stop tinkering around the edges of our approaches to copy testing and to recognize that the emperor has no clothes – or is at best quite skimpily clad. While there are certain aspects of today's copy testing systems that still provide some value, it's important to recognize what copy testing can do and what it can't. Until we have an open discussion about the elephant in the room, we will continue to lose constituents – advertisers who experience for themselves the failures of copy testing and who, as a result, throw the baby out with the bathwater.

We must acknowledge that our current copy testing systems aren't very good at predicting and that much of what passes as "diagnostics" is either pushing us into more formulaic and bad advertising or, when it comes to some of the newer implicit measurement approaches, simply producing in-the-moment mumbo jumbo that isn't particularly helpful.

Advertisers spend a lot of money producing and running ads. They have been asking us to help them determine which ads to run and how to make those ads better. Not only should we be able to provide better answers, we should be able to provide insights to help them to develop and refine campaigns – all elements working together in-market, over time to connect with consumers and build brand affinity, sales and ROI.

The challenge is to:

- Find ways to better predict whether ads will disrupt and engage in today's cluttered cross-channel environment.
- Test campaigns, not individual ads. While consumers see ads one at a time, they form lasting impressions on the basis of campaigns; and not all campaigns are TV-centric anymore – nor should they be.
- Develop research approaches that emphasize long-term memory; use experiential, in-the-moment approaches only for the types of diagnostic insights that can help us understand how to make our ads more effective.
- Incorporate behavioral measures – connecting ads with purchasing and sales data – but with caution, recognizing that advertising must not only produce sales but also needs to build brands' top-of-funnel dynamics.
- Create better feedback loops so we can be held accountable for our predictions and for the value provided by our diagnostics. Work on providing answers to the following: Do our predictions get borne out? If not, how can we adjust our systems to make them better? And does the diagnostic analysis that we provide actually help to improve the ads and campaigns?

Better, more relevant advertising

Ultimately, we should hold ourselves accountable not just for making copy testing better but also for helping our marketing partners in the creation of better, more relevant advertising. I am proud to be an advertising researcher but will be prouder of our industry when the advertising campaigns that we help to shape are stronger – more interesting, more engaging and more effective in building the brands that they support.

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●●● pricing research

What's their willingness to pay?

A framework for practical pricing research

| By Rajan Sambandam

snapshot

The author looks at ways to approach pricing research, including direct and indirect methods and the role of conjoint methods like discrete choice.

"How much should I charge for my product?" This is one of the most important and difficult questions facing a marketer. Charging too much (thus attracting too few customers) could be as costly as charging too little (leaving money on the table). The good news is research can help understand consumers' willingness to pay (WTP) for a product. But a practical issue researchers face is deciding on the right pricing approach to use. So many survey-based approaches are available – monadic, sequential monadic, Van Westendorp, conjoint analysis, etc. – that it is easy to be confused. What would be useful for a practical researcher is a simple framework for thinking about pricing research.

At its core, what a researcher is really trying to understand is what a consumer is willing to pay for a given product. Broadly speaking, this can be approached in two ways – direct and indirect elicitation. In the direct approach a product description of some kind is provided (without a price) and consumers are asked what price they are willing to pay for that product. In the indirect approach a product is provided (with a price) and consumers are asked about their likelihood to purchase that product. Pretty much all survey-based pricing approaches are some variation of these two approaches.

Which one should a researcher use and when? There is a bit more nuance and detail involved in that decision, so let's take a closer look.

Direct elicitation pricing

In the simplest variant of direct elicitation, a single product (or service) description is provided and consumers are asked (in an open-ended manner) for the price they are willing to pay. Though the implication is that they are willing to pay a certain price to purchase the product, it is not stated explicitly, hence the focus is squarely on the price. This can subtly place more emphasis on price rather than the value provided by the product. But an advantage of this method is that it requires very little effort from the consumer. Since an open-ended question is asked, a wide range of responses are possible. Calculating the WTP as

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the average price is straightforward. Alternatively, guidance could be provided in the form of a range of prices for the consumer to choose from.

There is research to show that direct elicitation tends to provide biased responses (perhaps because of the focus on price). So, the situations where this approach is used should be chosen with care. The most obvious case is early in the product development process. A company may have developed a new product concept and is interested in the price the market would pay. The concept may not be fully developed and hence the features would be ill-defined. Trying to get a precise measure of WTP would not be appropriate, so a method that gets at ballpark pricing would be sufficient. In such cases, direct elicitation of WTP would be simple to administer and also efficient from a research cost perspective.

There are more complex direct elicitation approaches possible, and one that is used in practice is called the Van Westendorp price sensitivity meter. Rather than simply ask about WTP, in this approach a series of four questions is asked regarding prices at which the product seems (too) cheap and expensive. The intersection of the various curves is used to determine an optimal price for the market as a whole. While multiple questions are asked, the focus is again on the price. Though the method is more complex than simple elicitation, it is not clear that it produces a clearly superior answer.

Since the direct approaches focus on the price of the product, there is no information on what happens when features change, the impact of competition or how WTP translates to sales. Given these drawbacks, the direct approaches are more useful in the early exploratory stage of product development where the priority is to get a ballpark price range.

Indirect elicitation pricing

The most straightforward change that would make an approach indirect is to attach a price to the product description and ask how likely a consumer is to purchase that product. This small change shifts the focus from price to the value inherent in the product. Further, it provides a better (though still biased) view of sales this product will likely garner and therefore is a more useful metric for the marketer. Asking about likelihood to purchase makes less sense early in the product development cycle. The more clearly defined the features are (i.e., the further the product is in development), the easier it will be for the consumer to provide a realistic answer.

Though it moves the focus from price to purchase (while still providing pricing information for the researcher), this method still suffers from the other flaws mentioned before. But it is at least possible to get at the issue of price sensitivity by using a monadic approach (sometimes called A/B testing). Here, the same product is shown to two similar groups of consumers at different prices and demand is estimated. When more than two groups are used it can produce a nice (downward-sloping) demand curve with a useful property – identification of potential kinks or non-linearities that can suggest interesting price points. The downside is that it comes at a cost in terms of the sample size required across all the groups in order to get robust results.

One variant used in practice is called sequential monadic or price laddering (similar to the idea of contingent valuation in the academic literature). Here a single cell is used and if a respondent indicates a low willingness to buy at the given price, a lower price (or two) is offered. The increase in demand across the prices indicates sensitivity, though of course, the later price estimates are biased because of prior exposure.

None of the methods mentioned so far get at the root of the problem: the relative realism of the pricing research. Direct elicitation of WTP is the least realistic and provides the least information. Use of purchase likelihood is somewhat better but does not take competition into account (as happens in real life). To get over this hurdle one could place the target product in a competitive setting (such as a simulated grocery shelf) and record how often it is chosen. But now there are several additional variables introduced into the mix and we cannot be certain about their impact on the demand for our product. What is really needed is an approach that maintains this realistic setting but still provides pricing information in a systematic and effective manner.

That is exactly what conjoint analysis does.

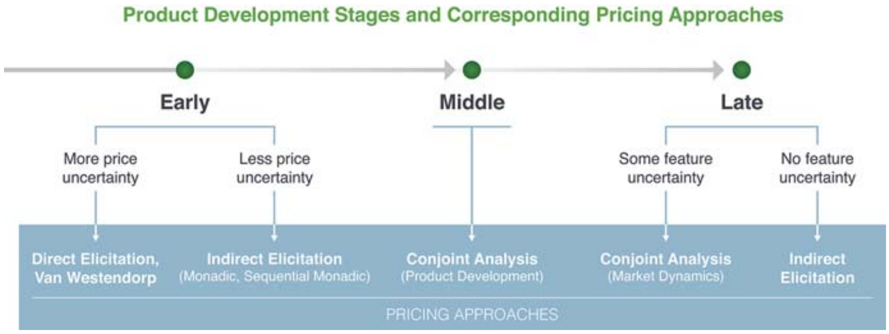
Conjoint analysis and pricing

This is really a family of techniques but the most popular variant is called discrete choice. As the name implies, consumers are shown sets of products and asked to choose the one they are most likely to buy. This is quite similar to the behavior they would exhibit in a real buying situation. To make the process even more realistic, the choice task usually includes a "None" or no-choice option, which can help increase the accuracy of demand and hence price estimation.

In a typical conjoint exercise, products are described by attributes (often including brand and price), each with two or more levels. By combining various attribute levels, products can be formed and displayed to consumers as choice options. Choices made by consumers provide information on what is important to them. The choice tasks are created using an experimental design so as to extract maximum information. For example, a high-quality, high-price product might be shown with a low-quality, low-price product. There is no obvious "right" answer and hence the choice made by the consumer provides information on what she values. But if the choice had been between a high-quality, low-price product and a low-quality, high-price product then the information value of the choice is minimal (as everyone would choose the former). By providing the consumer with a series of such choices and forcing her to think and trade-off between features, conjoint analysis is able to gather information on what is truly important to consumers.

Price is one of the features included in the exercise but not the only one. It is combined with other features and together they are displayed as a set of complete products, thus reducing the focus on price as compared to the direct elicitation methods. Thus the demand estimated at various price points through this approach tends to be more accurate. The output is usually provided in the form of product shares which can be easily understood by all constituents. A simulator can generate what-if scenarios when product features and

Figure 1



prices are changed, thus providing the kind of marketplace simulation not possible with any other pricing approach.

The conjoint approach does have some disadvantages. Multiple screens of products need to be shown to respondents and if the number of attributes is large it can make the exercise tedious. Though the method is robust and is shown to have practical value, it is complex in terms of design and analysis and usually requires specialized support. Hence it is not as simple as using direct elicitation and reporting a single WTP number.

Recommendations for pricing research

We started with this question: "How much should I charge for my product?" To identify the appropriate research needed to answer this question, we first need to understand where the product is in the development process (Figure 1). Early in development, when the product is mostly conceptual and fuzzy, accurate pricing information is neither attainable nor desirable. So a direct elicitation approach may be best, while being cognizant of the ballpark nature of the pricing. This also has the advantage of keeping the research simple, quick and economical.

If it is later in product development when the features are firmed up, conjoint analysis (generally discrete choice) would not only provide good information on pricing but also identify attractiveness of various product features. In fact, there two ways in which conjoint analysis can be used, if we can consider the middle and final stages of product development to be distinct.

In the middle stage, conjoint analysis can be focused on the features and price of the target product and not on brand name and competitive dynamics. Survey respondents make trade-offs and identify important features, indicating their willingness to pay. If the company is planning on introducing a new or modified feature, this stage can identify whether it has inherent value and how much. Longer lists of features may be more appropriate in this stage.

A second conjoint analysis can then be used in the final stage of product development. The focus here is on market dynamics rather than understanding the feature and price trade-offs. Hence, appropriate competitive brand names, features and prices are included while keeping the list of features short. Once data are collected, market simulation becomes very important and can identify (through share changes), what optimal price to charge under various scenarios. The market simulator can not only identify the price that can maximize share but can also reveal the price at which revenue and even profit can be maximized. This is one of the greatest advantages of using conjoint analysis in pricing research.

If the product is fully-baked and the only objective is to get a good sense of its market appeal indirect elicitation can also be used here. A single product fully described (including price) is shown to respondents and purchase likelihood is measured. The score is easier to interpret if normative data are available for comparison.

Ultimately, there are many ways of doing pricing research using surveys but thinking about it systematically and using the product development framework can help a researcher choose the right approach.

Rajan Sambandam is chief research officer at TRC Market Research, Fort Washington, Pa., and adjunct associate professor at Columbia Business School. He can be reached at raj@trchome.com.

••• a Quirk's resource guide

EXPERTS
In Global Marketing Research

Finding the right company to fulfill all of your marketing research needs can be challenging, but one of the factors to consider when choosing the right firm is its geographic reach. Often, your business needs call for research projects to be conducted outside of your organization's home state or home country. By partnering with a knowledgeable global research company it is easier to have conversations with the world's consumers and overcome difficult cultural barriers, such as language translation, exchange rates and local customs that need to be understood in order to gauge their impact on the research process. A firm that can conduct research globally acts as an important partner and gives unique insights into different cultures and backgrounds, helping develop your target profile while also providing you with a total market view. A global company that carefully researches various markets can provide a diverse look at consumers that could prove to be invaluable for your project. Here is a list of some of the top firms that provide global market research services.

quirks.com/articles/2016/20160333.aspx

AcuPOLL Precision Research Inc.

Founded: 1991 | 30 employees
Jeff Goldstein, President

Our logo has a globe in it for good reason. AcuPOLL has been executing complex international innovation and marketing projects for 20 years in more than 35 countries. Our unique flexibility of testing online, via qual-quant central location tests or a mix of both, allows us to conduct research anywhere

in the world and fuse together the most effective, culturally informed and cost-efficient solution. AcuPOLL's forward-looking alternative approach to concept advancement gives you greater insight and more ways to optimize innovation, propelling projects further, faster. Call now and have us customize a solution for your challenge!

Phone 513-943-0020
www.acupoll.com

B2B International

Founded: 1998 | 120 employees
Matthew Harrison, CEO

B2B International is the largest B2B-focused market research firm with offices across North America, Europe and Asia-Pacific. Our client portfolio includes 600 of the world's largest 1,500 companies. We have conducted over 3,000 B2B research studies spanning a wide range of sectors from traditional heavy industry to financial and business services. From sole proprietors to corporations, from procurement to production, we know how to reach the right audiences and extract the intelligence you need. As B2B specialists in branding, product development, segmentation, customer experience, pricing and more, we provide the most comprehensive range of B2B research services to give your brand a competitive edge.

Phone 914-761-1909
www.b2binternational.com

Blackstone Group

Founded 1987 | 51 Employees
Ashref Hashim, CEO

For over 28 years, The Blackstone Group has been providing international marketing research solutions in more than 100 countries. Blackstone delivers a global reach with state-of-the-art technologies, multiple offices and partners around the world. We have a proven track record in the design and management of research projects and data collection utilizing mixed-mode methodologies. Our key areas of tracking and evaluation expertise include customer experience, new products, brand and advertising in the form of full custom research solutions. The Blackstone Group is a trusted resource with a reputation for fast turnaround and consistently reliable, high-quality performance.

Phone 312-419-0400
www.bgglobal.com

Blueocean Market Intelligence

Founded 2000 | 1,000+ employees
Dr. Kumar Mehta

Blueocean Market Intelligence is a global analytics and insights provider that helps corporations realize a 360-degree view of their customers through data integration and a multi-disciplinary approach that enables sound, data-driven business decisions. Since we live in a highly dynamic and multidimensional world, we believe the most effective business decisions come from a synthesis of data streams and not from one-dimensional sources. Using our 360 Discovery approach, we ensure the comprehensive use of all available structured and unstructured data sources, enabling us to bring the best to bear against each engagement. Strong decision support is enabled through a combination of analytics, domain expertise, engineering and visualization skills brought together in harmony. Leading companies have benefited from our partnership with financial growth, 360-degree views of their markets and competition and improved customer acquisition, satisfaction and retention.

Phone 425-615-7474
www.blueoceanmi.com

Brädo Creative Insight

Founded 1996 | 35 employees
Steve Nollau, President & Chief Strategy Officer
Bob Cuneo, President & Chief Creative Officer

Brädo Creative Insight is a strategic market research agency comprised of creative strategists – people with advertising agency creative, planning and research backgrounds as well as those with brand management experience. We exist to inspire; inspire our clients, inspire consumers and inspire each other. We're not classically-trained researchers, we're creatively-trained problem solvers. We specialize in discovering and articulating creative insight in the form of positioning and messaging research, innovation and ideation, concept evaluation and optimization, user experience research, shopper marketing insights and customer portrait studies. We believe it is our job to inspire clients to research boldly and execute bravely.

Phone 314-621-9499
www.brado.net

Civicom Marketing Research Services

Founded 2000 | 350 employees
Rebecca West, Global VP, Marketing Research Services

Civicom is a leading-edge provider of audio, Web and Internet technology solutions that enable marketing researchers to engage respondents, moderators and clients in research from wherever they are located in the world. We facilitate local language IDIs, focus groups, asynchronous online research/bulletin boards, mobile qualitative studies, audio diaries, patient journeys, video journals, shopper insights and mystery shopping. We provide translation capabilities, plus a state-of-the-art proprietary transcription system with flexible delivery dates and transcriptions in multiple languages. We've facilitated virtually every kind of phone or Web-enabled marketing research project possible. We set the standard in superior client service and support.

Phone 203-413-2423
www.civi.com/marketingresearch

Customer Lifecycle LLC

Founded 2008 | 18 employees
Karin A. Ferenz, CEO

Customer Lifecycle is a global research consultancy working with B2B/B2C companies to plan and conduct research to accurately identify and measure requirements for customer acquisition, satisfaction and loyalty, share-of-wallet growth and retention. We help organizations get better business results through improved integration of research findings into day-to-day operations. With reach to more than 3 million individuals in over 160 countries, we conduct strategic qualitative and quantitative research in multiple localized languages on a worldwide basis. We help companies avoid costly mistakes by focusing on thorough front-end planning, appropriate support for research execution and action implementation at the back end.

Phone 630-412-8989
www.customerlifecycle.us

Decision Analyst Inc.

Founded 1978 | 150+ employees
Jerry W. Thomas, CEO

Decision Analyst conducts research and analytical consulting assignments throughout North and South America, Europe, Australia and Asia. Decision Analyst has the multicultural professionals, software, technology and analytical tools to address business and marketing issues on a global scale. It maintains proprietary online panels in over 150 different countries and has a network of research partners in all major countries. Decision Analyst delivers a blend of primary research, analytical consulting and modeling to help companies develop optimal marketing strategies, build powerful brands, improve product performance, increase advertising effectiveness, improve package communication, strengthen promotional programs and accelerate new product development.

Phone 817-640-6166
www.decisionanalyst.com

Fieldwork

Founded 2001 | 13 employees
Michelle Borea, President

Fieldwork Network International understands the unique difficulties of conducting research in far-reaching countries. We are your connection to qualitative and quantitative project management across the globe – a single contact that means time-saving convenience, simplicity and seamless continuity. From the initial proposal to dates in-field, Fieldwork is there through every step to ensure a high level of research and data collection. Our services include managing language and cultural barriers (local moderation, advice on local customs, translation services), handling currency conversion and exchange rates and managing vendor procedures and processes. Focus on the research. We'll do the rest.

Phone 888-863-4853
www.fieldwork.com/global-field-management

FocusVision

Founded 1990 | 380 employees
Eric Grosgogeat, CEO

FocusVision is the leading global provider of integrated global technology solutions for both quantitative and qualitative market research. The company has specialized in research facility videostreaming since it was founded in 1990 and has grown to offer best-in-class quant+qual research solutions for every aspect of an organization's research practice, including Webcam focus groups, ethnography streaming, asynchronous online software, mobile device usability studies, robust survey programming and reporting platform as well as panel management. FocusVision has offices in the United States, United Kingdom, Bulgaria, Brazil and Singapore.

Phone 800-433-8128
www.focusvision.com

Frontline Global Solutions

Founded 2006 | 90 employees
Roberta Fimognari, CEO

Frontline Global Solutions is a world leader in brand standards and customer-facing service measurements. With over 70 years of combined industry experience and excellence, we thoroughly identify your needs and build custom solutions specific to your business. Our key differentiator is that we lead the industry with our geographic reach through 20 offices, with approximately 150,000 active field agents in 132 countries. For you, this means local people, local offices and local field agents – people with the knowledge and cultural understanding to personally deliver real and actionable insights. We boost your ROI with services that will increase your overall business performance.

Phone 888-448-4703
www.ffglobalsolutions.com

FUEL

Founded 2008 | 17 employees
Tiffany Hays, CEO

FUEL is a full-service field management agency specializing in front-to-back fieldwork across the globe. We offer collaborative visions from veteran field managers with over 40 years of experience, a mastered set of global qualitative and quantitative methodologies, including traditional and online expertise, a worldwide network of heavily-vetted partners and 24/7 support. The Focus Room, our boutique facility located in New York City, has been recognized as a top-rated qualitative agency for 30 years. Designed to optimize qualitative research, our studio features state-of-the-art technology, three modern suites, flexible layouts, stylish furnishings and an expert management team.

Phone 212-935-6820
www.fuelyourworld.com

InContext Solutions

Founded 2009 | 90 employees
Mark Hardy, CEO

InContext Solutions is the global leader in scalable Web-based virtual reality retail and shopper intelligence solutions dedicated to providing decision-critical insights powered by 3-D virtual shopping simulations. In short, we have revolutionized the way brands and retailers understand and optimize the shopper experience. InContext provides a unique in-depth perspective on what consumers see on the shelf, how this drives their purchase behavior and why. With custom virtual reality research and ShopperMX™, our virtual reality simulation and shopper insights platform, InContext Solutions provides the data and insights needed to make faster, smarter, more profitable business decisions.

Phone 312- 462-4198
www.incontextsolutions.com

info Analytica

Founded 2003 | 195 employees
CEO: Amit Gupta

InfoAnalytica Inc. is a specialty marketing research services firm based out of San Jose, Calif. The company focuses on providing actionable and decision-critical insights through robust primary and secondary research methodologies. InfoAnalytica has helped more than 150 global corporations with strategic and tactical decision-making to enhance profitability and market shares. InfoAnalytica's research expertise spans across various industry verticals including technology, telecommunications, retail, health care, financial services, e-commerce and manufacturing. Their clients include Yahoo, PayPal, UCLA Extension, Dun and Bradstreet, eBay, TechTarget, CapTap, Escalon, WhiteHat Security, Identify Finder and several more.

Phone 650-314-8048
www.infoanalytica.com

Issues & Answers Network Inc.

Founded 1988 | 500+ employees
Mohit Gour, Director International Field Services

Issues & Answers Network Inc. is an independent global marketing research firm providing everything from survey and sampling design, data collection (400 CATI stations in five U.S. call centers and 160 CATI stations in Europe), project management to data analysis. Our international network of reliable alliance partners extends our research capabilities across six continents. International research capabilities include qualitative, quantitative, Web and Web-enabled ethnographies as well as translation and transcription services.

Phone 757-456-1100
www.issans.com

Market Analytics International Inc.

Founded 2002
Michele McKenna, CEO

Market Analytics International starts with clients' needs to provide effective global market research and business intelligence solutions. The company conducts qualitative and quantitative research as well as competitive and market intelligence across a wide range of B2B and B2C industries. Using a variety of research tools and techniques, Market Analytics is focused on innovative and non-traditional solutions. A multicultural team of over 5,000 employees, independent contractors and in-country researchers brings unique perspectives from diverse industries and cultural backgrounds. Having conducted research in more than 100 countries and numerous languages, Market Analytics effectively bridges research, culture and insights.

Phone 201-556-1188
www.marketanalytics.com

Rabin Research Company

Founded 1963 | 20 employees
Michelle Elster, President

International and domestic B2C and B2B marketing research services for packaged goods, financial, health care/pharmaceuticals, services, insurance, entertainment and new technology industries. Service principles: high-quality work, on-time delivery, creative study designs, strategic insights, competitive prices, exceeding expectations. Study types: concepts, segmentation, product use/sensory, names, packages, product design, advertising, customer satisfaction, awareness/attitude/usage, tracking, pricing, problem detection, promotions, positionings, promises. Data collection techniques: Internet/mobile, telephone, central-locations, mail and in-person. Qualitative and quantitative methodologies.

Phone 312-527-5009
www.rabinresearch.com

RTi Research

Founded 1979 | 55 employees
David Rothstein, CEO

RTi helps turn insight into action. We are an innovative global full-service market research company and for more than three decades, our clients have counted on us to connect the dots, tell the story and influence action. We are an AMA Gold Top 50 company and a Connecticut Top Workplace. Our tremendously talented, experienced and dedicated team provides unparalleled marketing-focused research and brand strategy services to the most highly regarded brands within their respective industries. Clients come to RTi seeking higher level involvement, more insightful thinking and extraordinarily attentive service; they stay because we deliver – we support their success.

Phone 203-324-2420
www.rtiresearch.com

Schlesinger Associates
Quality Without Compromise

Schlesinger Associates

Founded 1966 | 600 employees
Nadine Casaletto, Director, Global Qualitative Solutions

With proprietary offices in the EU and with strategic partnerships worldwide, Schlesinger Global enables you to take the pulse of markets around the world. Our clients trust us as their global research partner to deliver high-quality qualitative or quantitative recruitment and project management for their important projects for health care, consumer, B2B and technology markets. Your project manager and single-point-of-contact is fully accountable for your study success. As norms and behaviors vary across the world, we start by taking a consultative approach to supporting you and advising which methodologies and approaches are likely to be most successful in each international market. Celebrating 50 years!

Phone 732-670-3397
www.schlesingerassociates.com

SSI®

SSI (Survey Sampling International)

Founded 1977 | 3,600 employees
Chris Fanning, President and CEO

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

Phone 203-567-7200
www.surveysampling.com

Strategic Research Initiatives LLC
Keep your business focused in the right direction

Strategic Research Initiatives LLC

Founded 2009 | 7 employees
Timothy F. Grainey, CEO

Strategic Research Initiatives LLC has extensive experience conducting market research in six continents and diverse nations, including Argentina, China, Germany, India, Papua New Guinea and Zambia. SRI specializes in automotive research, particularly large-scale advanced product development clinics in Asia, Europe, North and Latin America. Tim Grainey has opened research offices previously in Brazil and Mexico. We also help clients do exploratory market entry research to expand into other markets, including China, Russia, the United Arab Emirates and others. Tim took a cultural exchange trip to Cuba recently and has set up avenues for primary and secondary market research in this market.

Phone 480-457-1688
www.strategicresearchinitiatives.com

Names of Note

■ *MarketVision Research*, Cincinnati, has promoted the following: **Lisa Fridley** and **Joel Schindler** to senior vice president; **Emily Taylor** to senior graphic designer, team lead and **Becky Schraffenberger** to vice president.

■ **James A. Attwood Jr.** was elected as non-executive chairman of the board of directors for *Nielsen*, New York, effective January 1. Attwood succeeds **David L. Calhoun**, who served as executive chairman of the board since 2014.

■ New York investment firm *Oppenheimer & Co. Inc.* has named **Joan Khoury** as managing director, chief marketing officer, a newly created position.


Worthge

■ **Scott Worthge** has joined Irvine, Calif., firm *MFour Mobile Research* as a senior solutions executive.

■ Boston-based digital agency *Genuine* has hired **Eric Freedman** as its SVP, marketing.

■ Tonawanda, N.Y., researcher *Segmedica/xsperient* has appointed **David Knight** as director of client solutions.

■ Vancouver, B.C., software firm *Aquatic Informatics Inc.* has promoted **AJ Leitch** to vice president of customer success.

quirks.com/articles/2016/20160311.aspx

■ In Bethesda, Md., researcher *Abt Associates* has elected **Sheila P. Burke** and **Manoj P. Singh** to its board of directors.

■ *East Carolina University* in Greenville, N.C., has named **Katie Whitley** as assistant director of marketing.

■ Detroit research and consulting firm *Morpace Inc.* has promoted **Jason Mantel** to senior vice president, automotive.


Moreno

■ **Samadhi Moreno** has joined the RMS health care team as health care research associate for Baldwinsville, N.Y., firm *Research & Marketing Strategies Inc.*

■ Charlotte, N.C., online loan marketplace *LendingTree* has appointed **Sam Yount** as CMO. He will be based in the firm's Burlingame, Calif., office.

■ Cincinnati researcher *Burke Inc.* has promoted **Tara Marotti** to senior vice president, head of client services.

■ **Sherrie Binke** has been appointed as an executive vice president/customer experience officer for Irving, Texas-based *M/A/R/C Research*. She will be based in Chicago.

■ Framingham, Mass., research and consulting firm *IDC Health Insights* has hired **Adriana Allocato** as senior research analyst, EMEA.

■ **Enrique Domingo** has been appointed as the new chairman of *ESOMAR's* professional standards committee for a three-year term starting January 2016. He succeeds **Adam Phillips**, who had reached the end of his fifth term of office. Domingo will also chair ESOMAR's disciplinary subcommittee, which examines complaints received at ESOMAR.


Melnick

■ In New York, researcher *GfK* has appointed **Dave Melnick** as vice president of consulting for the fashion and lifestyle practices in North America.

■ San Diego-based strategic consulting firm *ResearchWorks* has promoted **Teresa Sanchez** to president of the organization.

■ *Nielsen*, New York, has promoted **Angela Talton** to chief diversity officer.

■ U.K. sampling agency *Sample Answers* has appointed **Phil Bird** as managing director.


Liuzzo

■ New York-based firm *Radius Global Market Research* has hired **Joy Liuzzo** as vice president in the firm's Seattle office.

■ Chicago researcher *IRI* has appointed **David Hoodis** as president, Americas retail.

■ **Zander Lurie**, current chair of the board for Palo Alto, Calif., online survey and data insights firm *SurveyMonkey*, has been named CEO of the company following **Bill Veghte's** decision to step down as CEO. Lurie and Veghte will both continue to serve on SurveyMonkey's board of directors. Additionally, current board mem-

ber, **David Ebersman**, will become chair of the board.

■ In St. Petersburg, Fla., *Minor League Baseball* has appointed **David A. Wright** as chief marketing and commercial officer.

■ Canada-based survey software provider *Voxco* has expanded the regional responsibilities of current VP of Sales for the Americas and Australia **Vincent Auger** to include Germany and Eastern Europe.


Auger

■ Research company *Fieldwork* has promoted **Denise Ambrose** to president of Fieldwork San Francisco.

■ U.K. firm *Dennis Publishing* has appointed **Brian Walters** as director of research and insight, with specific responsibility for the car ownership survey Driver Power.

■ Detroit research consultancy *Market Strategies International* has appointed **Melissa Sauter** as executive vice president and managing director of the financial services division and **Todd Mundorf** as senior vice president of research operations.


Sauter


Mundorf

■ U.K. firm *eDigitalResearch* has appointed the following: **Genevieve Groom** as associate director; **Leigh-Ann Harris** as research analyst; **Tyren Cooper** and **Debbie Gomez** as graduate research executives; **David Sloan**, **Eric Serrano** and **Shamil Nunhuck** as developers and **Julie Denham** as accounts assistant. Additionally, the company welcomed back former Research Manager **Shaun Smith** into a new role as product manager.

■ **Laura Beavin** has joined Los Angeles marketing insights and strategy agency *Coherency* as a senior research specialist.


Beavin

■ Piscataway, N.J., research solutions firm *Azure Knowledge Corporation* has appointed **Rafal Gajdamowicz** as managing director of its European business, based in London.

■ In Atlanta, researcher *Focus Pointe Global* has promoted company president **Laura Livers** to CEO effective January 1. Former CEO **Noel Sitzmann** will assume the role of executive chairman.


Livers

■ Health care research and consulting firm *Research Partnership* has hired multimedia graphic designer **Amanda Brent** at the company's London headquarters.

■ Albuquerque, N.M., communications research company *Ameritest* has tapped **Jennyfer Guebert** as director of marketing, a new position.

■ Consulting and research firm *Ducker Worldwide* has appointed **Lawrence C. Wu** as a director out of its North American headquarters in Troy, Mich.

■ Port Washington, N.Y., researcher *Paradigm Sample* has appointed **Michael Klotz** as vice president of client services.


Klotz

■ Australia-based firm *Gateway Research* has appointed **Gai Le Roy** as a partner and COO.

■ **Tyson Webber** has been named the new president of Germany-based firm *GMR Marketing*. He succeeds **Craig Connelly**, who will continue to work with GMR in a senior advisory role throughout 2016.

■ Cincinnati insight firm *Directions Research* has hired **Carrie Keller** as a senior staff accountant and **Neal Hubert** as a senior research consultant.

■ Oslo, Norway, data services firm *Norstat* has appointed **Antanas Nasutavicius** as the managing director of Norstat Lithuania.


Nasutavicius

■ *Visa Inc.*, Foster City, Calif., has appointed **Lynne Biggar** as executive vice president and chief marketing and communications officer, effective February 1. She will also serve as a member of the company's executive committee and operating committee.

■ Mason, Ohio, firm *Illumination Research* has appointed **Joanne Suh** as vice president - client services.

■ Boston-based fantasy sports firm *DraftKings Inc.* has appointed **Janet Holian** as global CMO.

Research Industry News

News notes

■ The Media Rating Council has voted to grant accreditation to **Media Metrix**, Reston, Va., firm comScore's flagship syndicated digital audience measurement service.

Acquisitions/transactions

■ Redwood City, Calif., digital marketing firm **Pierry Software** has acquired Cleveland-based marketing firm **C.TRAC Inc.** Terms of the deal were not disclosed.

■ Port Washington, N.Y., researcher **NPD Group** has purchased New York-based **Nielsen's** VideoScan point-of-sale retail tracking service for the home video market. Combining the acquisition with its existing data assets and new services in development will allow NPD to offer information and insight to help the entertainment industry understand and anticipate how consumers are acquiring entertainment. NPD will integrate the service into an expanding product portfolio, including new Checkout Tracking services it is developing for digital tracking of home entertainment sales.

■ Teaneck, N.J., firm **Perception Research Services** and Paris-based researcher **IN VIVO** have merged their companies to create a new insights agency, PRS IN VIVO. The senior management of both entities will remain with the new company.

quirks.com/articles/2016/20160312.aspx

■ **NAB Labs**, the technology division of The National Association of Broadcasters in Washington, D.C., has invested in Baltimore-based start-up **Yet Analytics**.

■ Private equity firm **Nordic Capital Fund VIII** has acquired Stockholm, Sweden, research technology firm **Cint** from a large shareholder group that includes Prime Ventures, Creandum, Cipio Partners, the founder and a group of individual investors and employees.

■ **Kantar**, London, has acquired a majority stake in its partner in Denmark and Sweden, researcher **Millward Brown Denmark ApS**, to broaden its offer in all Nordic markets.

■ **Apple**, Cupertino, Calif., has purchased San Diego artificial intelligence start-up **Emotient Inc.**

■ **RTi Research**, Norwalk, Conn., has acquired boutique market research firm **Hamill Associates**. Barbara Hamill, founder of Hamill Associates, will join RTi Research as a senior vice president.

■ Wilkes-Barre, Pa., firm **eBay Enterprise Marketing Solutions** has acquired **AffiliateTraction**, a Santa Cruz, Calif., performance marketing agency. Terms of the transaction were not disclosed.

■ **IBM**, Armonk, N.Y., has acquired Germany-based firm **IRIS Analytics**.

■ Stamford, Conn., research technology firm **FocusVision** has acquired Austin-based firm **Kinesis Survey Technologies**, now KinesisPanel, an online panel management platform. The addition of KinesisPanel to FocusVision's suite of research solutions will enhance the product options available to both FocusVision and KinesisPanel clients by providing a wider set of research tools with real-time data synchronization into a single panelist database.

Alliances/strategic partnerships

■ Los Angeles-based media company **Fullscreen** and New York media investment management firm **GroupM** have partnered to form an influencer marketing partnership called Playa to serve clients across GroupM and WPP agencies. Playa will be staffed by a team of influencer marketing specialists and will give clients sponsorship opportunities with creators and programming formats across YouTube, Instagram, Vine, Snapchat and more. They will also have access to Fullscreen's proprietary creator/client platform, which matches a brand campaign audience target with creators who can reach that audience with scale.

■ New York-based firm **SHC Universal** and Towson, Md., panel provider **Rare Patient Voice** have formed a preferred partnership, enabling access to patients and their caregivers with rare and orphan diseases for market research surveys. With this collaboration, SHC Universal will also have access to Rare Patient Voice's networks.

■ Portland, Ore., technology company **Dialsmith** and Provo, Utah, software-as-a-service company **Qualtrics** have formed a partnership that will let Qualtrics customers add Dialsmith's online dial testing to their surveys. Qualtrics is offering Dialsmith's service through the Qualtrics Innovation Exchange marketplace.

Association/organization news

■ In Los Angeles, **Women in Research** (WIRe), a nonprofit organization for women in the market research industry, has formed an information alliance with **ESOMAR**. ESOMAR will gain access to WIRe's online interactive platforms and receive recognition at all WIRe events and programming. In addition, ESOMAR's CFO Marie-Agnès Mourot de Lathyle will serve on WIRe's advisory board. The Research World Connect blog will also include WIRe-curated content and WIRe members, sponsors and partners will have more direct access to ESOMAR communication channels and expertise to help promote activities and events and gain insight into issues facing the industry.

■ **ESOMAR** and market research agencies comScore, **GfK**, **Kantar** and **Nielsen** have launched Research Choices, a joint initiative to boost transparency and choice for online audience measurement research. The initiative results from 18 months of joint representation activities in front of European legislators in the context of negotiations to adopt the EU General Data Protection Regulation. The joint representation activities and the portal are being facilitated by ESOMAR at the behest of the founding Research Choices partners. The Web-based portal will provide the general public with educational content initially demonstrating how online audience measurement research and online market research generally is conducted as well as highlighting participating companies' privacy policies and tools to exercise opt-out and choice. Further development of the portal will be spearheaded by the Research Choices partnership. The partnership is open to all responsible research organizations that are members of a national or international research association subscribing to the ICC/ESOMAR Code or an equivalent national ethical code for market, opinion or social research.

Awards/rankings

■ Irvine, Calif., firm **MFour Mobile Research's Surveys** on the Go mobile survey application has been listed as a top research application for "boosting your bank account" by *Self* magazine.

■ **BrainJuicer**, a U.K. research agency, has released the 2015 Global FeelMore50, its annual ranking of the world's best ads. According to the ranking, **Purina's** "Puppyhood" ad topped the list as the best ad of 2015 for being the most emotive. The FeelMore50 used BrainJuicer's predictive BrainJuicer Ad Testing methodology to test over 500 of the world's most acclaimed, viral and award-winning ads, with over 42,000 consumers ranking the ads on a one- to five-star rating.

New accounts/projects

■ **Nielsen**, New York, has been named the preferred provider of consumer insights and analytics for **Dole Food Company**, Westlake Village, Calif. Nielsen and Dole have entered into a long-term contractual relationship that will provide Dole with a view of the consumer through Nielsen's suite of products and services.

■ Burbank, Calif., firm **ThinkNow Research** has expanded its demographic focus from a U.S. Hispanic focus to include African-American and Asian demographics.

New companies/new divisions/relocations/expansions

■ Fort Washington, Pa., firm **M3 Global Research** has opened its first U.S. research facility, M3 Philadelphia Studios. The studio provides the health care community and the consumer goods industry with custom AV technology and market research recruiting. The firm has a studio in Hammersmith, London, serving the European market, making the U.S. the second global location. Lindita Mezani, vice president of market research, will serve as the Philadelphia Studio manager.

■ New York firm **SIS International Research** has launched its Integrated Research unit, which brings together traditional market research methods with sensory research methods, including eye-tracking and other solutions like the company's SIS-SQREEM Big Data solutions. The integrated research methods allow companies to measure consumer reactions in real time. The firm has also appointed Joe Messina as research director, Integrated Research Services.

■ As of January 1, Reston, Va., firm **Veris Consulting**'s outsourced accounting, survey research and primary market research divisions became **Vault Consulting**. Vault has also launched its new Web site.

■ London-based research agency **Tapestry** has opened an office in New York to be headed by Esther Burke.

■ Research and technology company **Toluna** has opened a new office in Kuala Lumpur, Malaysia, led by Christine Tan, senior director, Southeast Asia.

Research company earnings/financial news

■ Tampa, Fla., firm **Study Hall Research** has reported that Q4 quarterly revenues increased by 57 percent versus corporate revenues for the same period one year ago. Annual revenue for 2015 increased 41.8 percent versus annual revenue for 2014. In addition, CY2015 revenue for the company was the highest posted in its six years of operation. Since its inception, the company has posted average annual revenue gains of 18.4 percent per year.

■ **Dapresy**, a Sweden-based software firm, has reported a record year with organic growth of more than 35 percent in 2015.

••• a Quirk's resource guide

16 TOP Recruiting Companies

Editor's note: Due to a production error, the introductory text and title accompanying the February issue's recruiting companies resource guide incorrectly referenced the previous issue's resource guide. As a service to our readers and the companies listed in the guide, we are reprinting the full directory here.

There are multiple factors to consider when selecting a recruiting company, from the firm's level of experience to its processes and the employees executing and finishing the project. Underlying everything, though, are the company's databases. Without a range of sources from which to recruit, the firm won't be able to fill the quotas for those niche and hard-to-find respondent groups. Building a successful track record of securing the right participants in the right timeline starts with an experienced and creative staff that has a variety of methods of recruiting and has proven they can guide a project every step of the way. The best recruiters validate respondents prior to the research project, treat them with respect and courtesy and are able to accomplish the project within the agreed-upon cost and time parameters.

Here is a list of some of the top firms that provide recruiting and focus group services.

quirks.com/articles/2016/201602111.aspx

AOC Marketing Research

Founded 1980s | 25 employees
Cathleen Christopher, CEO

Top three in the nation for recruiting, according to Impulse Survey of Top Rated Focus Facilities 2015. AOC's specialties are focus groups, IDIs, large-quota taste tests, CLTs and other

in-person research in their Charlotte, N.C., facility. AOC features private client suites and a fully-equipped test kitchen with an experienced staff. Each of our four suites includes a private client lounge with an office and restroom, a client entrance/exit outside and separate HVAC controls for client and respondent areas. Only a 20-minute drive from the international airport, AOC is also minutes from several hotels and award-winning restaurants.

Phone 704-341-0232
www.aocresearch.com

Ascendancy Research

Founded 2005 | 20+ employees
LynMarie Winninger, CEO

"Top Rated" in the U.S. for responsiveness, value, client care by Impulse Survey in each of the past 10 years. Always developing innovative ways to recruit the real respondents to each project's highest standards and lowest incidence rates in the necessary turnaround time. Founded in 2005, Ascendancy Research Recruiting continues year after year to adopt the new technologies and methodologies to deliver on its promise. Whether you are looking for four or 400 for your project, this cutting-edge market leader is the provider of choice. For your advantage, they offer premium screener development and support, superior project management, round-the-clock recruit reporting and seasoned recruiters.

Phone 952-544-6334
www.ascendresearch.com

Civicom
MARKETING RESEARCH SERVICES
Ask Why We're Better
Innovative Technology Solutions
Marketing Research Support Worldwide

Civicom CiviSelect™ Recruiting

Founded 2000 | 350 employees
Rebecca West, Global VP, Marketing Research Services

The success of your project starts with the right recruits. CiviSelect™ is a unit of Civicom® Marketing Research Services. Our services are local to global and cover single to multi-market studies for respondents located in the U.S. or worldwide, in English or a local language. We provide discussion guide analysis, screener writing and review, respondent technology screening, disposition reporting, recruit status updates and scheduling for Web-enabled interviews, focus groups, mobile research and online research platforms. We handle incentives. We accept only marketing research recruitment assignments we are confident we can complete successfully using our internal team or through working with one of our global recruiting partners.

Phone 203-413-2423
www.civi.com/marketingresearch

Communications for Research Inc.

Founded 1997 | 140 employees
Colson Steber, Vice President, Business Development

Recruiting is what we do best. The person you work with takes a leadership role in the research by understanding the outcomes you need and taking ownership over being sure we deliver. Whether it is a recruit to an on-site customer event, online community or traditional methodology, we will learn the target audience profile and communicate our plan to execute. We can start in less than 24 hours and utilize a paperless process that makes the smallest recruits efficient and the largest projects manageable. We perform over 450 qual and quant recruiting projects annually with over 100 recruiters on our team.

Phone 573-775-4550
www.cfrinc.net

Eastcoast Research

Founded 1978 | 12 employees
Paula Corbett, CEO

Exceptional recruiting is our No. 1 priority. Our professional team is committed to excellence in recruiting, client satisfaction and developing long-lasting relationships, earning top ranks by Impulse Survey in 2014. We specialize in focus group recruiting in Eastern North Carolina with high show rates and articulate respondents. Our state-of-the-art facilities in North Carolina are centrally located in Wilmington and Greensboro and include wireless Internet, Web conferencing and digital recording technologies. Eastcoast Research will find the respondents you need!

Phone 910-763-3260
www.eastcoastresearch.com

Fieldwork

Founded 1983 | 750 employees
Stephen Raebel, CEO

At Fieldwork, we understand that the recruiting is the most crucial part of every research study. We have local databases and recruiting teams in every one of our 16 facilities nationwide as well as the centrally-located National Recruiting Center, boasting a database of over 1 million respondents in every corner of the country. Our recruiting often goes beyond our databases. The ability to network effectively in remote locations and to find respondents for more challenging studies is one of our strongest assets. For consumer, B2B or medical recruiting, you can… Focus on the research and let Fieldwork do the rest.

Phone 1-888-TO-FIELD 888-863-4353
www.fieldwork.com/recruiting

Focus Pointe Global

Founded 1988 | 500+ employees
Laura Livers, CEO

Focus Pointe Global is a leading national provider of high-quality qualitative and quantitative marketing research data collection services. The 1.5 million-member FPG QualPanel™ provides practitioners with the articulate and engaged participants required for any marketing research project, no matter the methodology. FPG owns and operates 18 premier focus group facilities in the major metropolitan markets that are also the major DMAs for quantitative research projects. FPG offers a wide range of services, including expert focus group recruiting and coordination, complete online services, health care and clinical, ethnographies, product testing, jury research and mystery shopping. FPG is committed to providing its clients unrivaled research solutions with professional integrity and the highest level of service quality.

Phone 888.873.6287
www.focuspointeglobal.com

Group Dynamics in Focus Inc.

Founded 1981 | 17 employees
Robin Kaplan, CEO

Group Dynamics in Focus offers over 30 years of experience in qualitative marketing research. Located in suburban Philadelphia, we recruit for our focus group facility as well as outside venues. You can rely on us for expert recruiting of health care professionals, B2B and consumers. With the emphasis on innovative solutions to complex projects, we are able to deliver what we promise to our clients. We are trusted for our skills in recruiting medical professionals nationally for both in-person and telephone research. Our loyal clients appreciate our commitment to provide high-quality research projects that run smoothly from start to finish.

Phone 866-221-2038
www.groupdynamics.com

L&E Research

Founded 1984 | 226 employees
Brett Watkins, CEO

L&E knows that finding the right people to talk to is key for a successful research project and we are passionate about recruiting the best respondents for your study. For over 30 years, L&E has successfully recruited consumers, health care professionals and business professionals for virtually every type of research project. We start with our database of almost 500,000 respondents, then use the latest technologies and one of the largest recruiting teams in the industry. With a dedicated project manager providing daily feedback and access to real-time recruiting updates through our Client Portal, you can feel confident in your study's success.

Phone 877.344.1574
www.leresearch.com

Mediabarn Research Services

Founded 2004 | 20 employees
Keith Deaven, CEO

A multiservice firm located just minutes from Washington, D.C, Mediabarn Research offers a professionally seasoned, expert research team for moderating and top-quality participant recruiting. Our in-house recruiting team, comprised of interviewers carrying up to 30 years of personal industry experience, are trained to identify and enlist only the most proficient and engaging respondents. Using a variety of recruiting methodologies, which include our expansive and ever-growing respondent database, social networks, personal and business connections, Internet research and infield engagements, we are capable of sourcing fresh respondents in markets nationwide for both qualitative and quantitative research.

Phone 703-890-0770
www.mediabarnresearch.com

Reckner Healthcare

Founded 1991 | 225 employees
David Reckner, CEO

Reckner Healthcare provides complete fieldwork solutions for pharmaceutical and medical marketing research projects. Serving clients for more than 25 years, the company specializes in delivering access to physicians, allied health care professionals, payers, decision makers and opinion leaders across the United States and the world. Reckner has its own independently-maintained panel and internally-designed panel management system, making it one of the industry's most robust, respected health care panels. Providing fast access and easy platform linkages, Reckner offers recruiting and scheduling for qualitative and quantitative health care research projects. Services include list matching, recruitment, scheduling, verbal confirmations, programming, hosting and project, segmentation and honoraria/1099 management.

Phone 215-822-6220
www.recknerhealthcare.com

Recruit and Field Inc.

Founded 2009 | 14 employees
Josh Dyszel, CEO

Recruit and Field Inc. is the nation's leading independent qualitative recruiting company. With an in-house database of over 300,000 registered respondents, we hand-select participants using telephone screening techniques for consumer, business and health care research projects. Services are available for nationwide methodologies, including online board, mobile app and other Web interviewing platforms. Recruiting for localized methodologies such as focus groups, in-depth interviews, ethnography, etc., are available in New York, New Jersey, Boston, Philadelphia, Chicago, San Francisco, Los Angeles, Atlanta, Houston, Austin, Dallas and Miami. Having a non-venue-based infrastructure allows RAF to deliver high-quality recruiting services at an excellent value.

Phone 646-400-5650
www.recruitandfield.com

Resolution Research

Founded 1990 | 10+ employees
Nina Nichols, CEO

Recruitment is the life source of a project. Resolution Research is the go-to firm for high-level, hard-to-recruit audiences. We specialize in recruiting medical respondents, from dentists, veterinarians and MDs to patients with orphan diseases. We have reach in education, financial, IT, CPG and AG as well as most other industries (after all, we've been in business for 25 years!). We work across all methodologies and platforms with all types of respondents, including KOLs and low-SES. We pride ourselves on our reputation as the firm that continuously delivers. When you need quality with a quickness, call Resolution Research first.

Phone 303-830-2345
www.resolutionresearch.com

RRU Research - Fusion Focus

Founded 1975 | 33 employees
Maryanne Livia, President

RRU Research has been providing excellence in recruiting and project management nationwide since 1975 and unveiled its NYC research facility, Fusion Focus, in 2013. At RRU, we believe our clients deserve an experience that brings together not only the highest-quality recruiting, project management and service but also a visually pleasing and comfortable facility experience that fuses the latest in technology and fine design. We believe these factors combine to give our clients not only the most enjoyable experience but will also produce the most valuable research results.

Phone 718-222-5600
www.rruresearch.com

Schlesinger Associates
Quality Without Compromise

Schlesinger Associates

Founded 1966 | 600 employees
Steve Schlesinger, CEO

Recruiting for thousands of studies annually, our clients trust us as their research partner to deliver high-quality qualitative and quantitative recruitment for their important and most challenging projects for health care, consumer, B2B and technology markets. Our experienced and resourceful teams have an unparalleled understanding of quality drivers across a range of recruitment solutions from panel to telephone to social media. We are fully committed to tracking down and engaging your target audiences to participate in our full range of methodologies. At Schlesinger, we dig deeper, leveraging participant connections and constantly pushing the boundaries of our capabilities to help you succeed. Celebrating 50 years!

Phone 732-906-1122
www.schlesingerassociates.com

SURVEY CENTER
FOCUS
A Shapiro+Raj Company

Survey Center Focus, LLC

Founded 1973 | 85
Susan Stanicek, Managing Director

Survey Center Focus is a top rated research company specializing in recruiting top C-suite executives, B2B audiences, physicians, low-incidence patients, KOLs, and difficult-to-recruit respondents. Our best-in-class recruiters, proprietary databases, and thoughtful project management ensure we're talking to the right people and unearthing powerful information. Due to our flexible nature, we are able to assign creative resources to get in the trenches and meet the toughest recruiting challenges. Our experience includes recruiting thousands of physicians for top pharmaceutical companies globally and Fortune 1000 C-suite executives for international consulting firms. With this expertise, we're ready to tackle all your toughest projects.

Phone 312-321-8100
ww.scfllc.com

CALENDAR OF EVENTS

••• can't-miss activities

ESOMAR will present its MENAP Forum 2016 on March 8-9 in Dubai. Visit www.esomar.org.

The Merlien Institute will hold its Market Research in the Mobile World - Asia-Pacific 2016 conference on March 8-10 in Kuala Lumpur, Malaysia. Visit apac.mrmw.net.

The Atlanta/Southeast Chapter of the MRA will hold an event, titled "Jazz Up Your Research Marketing Research Educational Conference," on March 9-11 in New Orleans. Visit www.marketingresearch.org/mrac/mra-atlantasoutheast-chapter.

Unicom will hold its Sentiment Analysis in Finance conference on March 10-11 in Singapore. Visit 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.

L&E Research will hold a Webinar, titled "Mobile Research in 2016: An Update" on March 18 at 12:15 p.m. CST. Visit info.leresearch.com/mobile-research-webinar.

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.

CASRO will hold its Digital Research Conference on March 29-30 at The Driskill in Austin, Texas. Visit www.casro.org.

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

The Southwest and Northwest Chapters of the MRA will be holding the 30th Annual Las Vegas Conference on April 5-7 at Planet Hollywood Hotel and Casino in Las Vegas. Visit lasvegas.swmra.org/.

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.

ESOMAR will hold its annual Latin America conference on April 10-12 in Bogotá, Colombia. Visit www.esomar.org.

AMA will hold its 2016 Marketing Research Academy for Business Professionals program on April 12-15 at the University of Georgia Terry College of Business Executive Center in Atlanta. Visit www.ama.org.

SKIM and **Sawtooth Software** will hold their 2016 European Conference and Training Event on April 12-15 at the Courtyard by Marriott Rome Central Park Hotel in Rome. Visit sawtoothsoftware.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.

Unicom will hold its Business Intelligence in a Networked World event on April 14 in London. Visit www.unicom.co.uk.

Unicom will hold its Data Analytics and Sentiment Analysis conference on April 14 in London. Visit www.unicom.co.uk.

Empresarial will host its spring studies trade show, the Printemps des Etudes, on April 14-15 at the Palais Brongniart in Paris. Visit www.printemps-etudes.com/exhibiting-and-presenting/home/.

Centaur Media will hold its Insight'16 event on April 27-28 at Olympia Central in London. Visit www.insightshow.co.uk.

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

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.

The Mobile Marketing Association will hold the MMA Mobile Marketing Leadership Forum on May 10-11 in New York City. Visit 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.

ESOMAR will hold its Asia-Pacific conference on May 17-19 in Tokyo. Visit www.esomar.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.

ESOMAR will hold its Summer Academy 2016 on June 5-9 in Amsterdam. Visit www.esomar.org.

CASRO will hold its annual Technology and Innovation Event on June 6-7 in New York City. Visit www.casro.org.

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. For a more complete list of upcoming events visit www.quirks.com/events.

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10 minutes with...

Katharine Giari and Brittany Williams
UX Researcher and Market Insights Manager, respectively, Etsy

Etsy has such a diverse community of sellers. What is the biggest challenge when gathering insights to drive sales and product development?

Katharine Giari: From a research perspective, one of the biggest challenges with having a diverse community of sellers is making sure we target the right groups when we recruit for qualitative studies. While around 80 percent of sellers on Etsy are women, they are at vastly different stages in their careers as sellers. Some are content to sell part-time, while others are on a different trajectory and aspire to become full-time business owners. Sellers also face unique challenges specific to what they sell. For example, someone who makes custom jewelry has a workflow that looks very different than someone who sells vintage furniture. Add another layer of complexity when you factor in sellers' location – within or outside of the U.S. Recently we've been working on a seller segmentation project that tries to go beyond demographics and business metrics to look at the more attitudinal and emotional factors at work – we hope this will help us fine-tune our recruiting efforts over time.

Brittany Williams: We also work closely with other functions across the organization to help us refine who we're speaking to during studies ... Working in this way has helped us incorporate moments of delight into products, which makes our users smile and feel good about using Etsy. For instance, when building our seller app – Sell on Etsy – we learned that sellers loved hearing the cash register "cha-ching!" on their computer each time they got a sale. So we incorporated this into the app so they have instant gratification when someone finds one of their items and makes a purchase.

What new research projects and/or methodologies are you focusing on in 2016?

Giari: We're developing our online international community and plan to use it to maximize the feedback we can get with a fairly small sample of buyers and sellers in some of our markets outside of the U.S. One of the core challenges with international research has been keeping pace with product development and attendant research needs without overwhelming the smaller base of international users. Through the online community we can get valuable insights to help inform global launches without conducting slow and costly qualitative lab research for every research need. Note that this is not a silver bullet. It is one methodology among several and will be used judiciously. However, by using an online community for international research we can maintain some flexibility and provide regular feedback to our product teams.

Williams: In addition, we're working hard to incorporate more innovation-oriented research into our portfolio. For example, in 2015 we launched Etsy Manufacturing, a new platform for manufacturers to list their services and connect with Etsy sellers. We began our research with manufacturers with an internal workshop to uncover our hypotheses, gaps in knowledge and open questions, and then created a series of design provocations, which we used as prompts during exploratory interviews with manufacturers. It was really important for us to conduct these interviews in person and to speak with manufacturers in a variety of industries, from jewelry to apparel, and to have other Etsy teammates be a part of these interviews. As our understanding of manufacturers grew, we were able to refine and home in on a more clear-cut vision of what the product might become. At the end of the day, this meant that we could build a product that took into account both manufacturer and Etsy seller needs.

Read the full interview at quirks.com/articles/2016/20160322.aspx.