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SPECIAL SECTION

20 Top Taste Test Companies

April 2016

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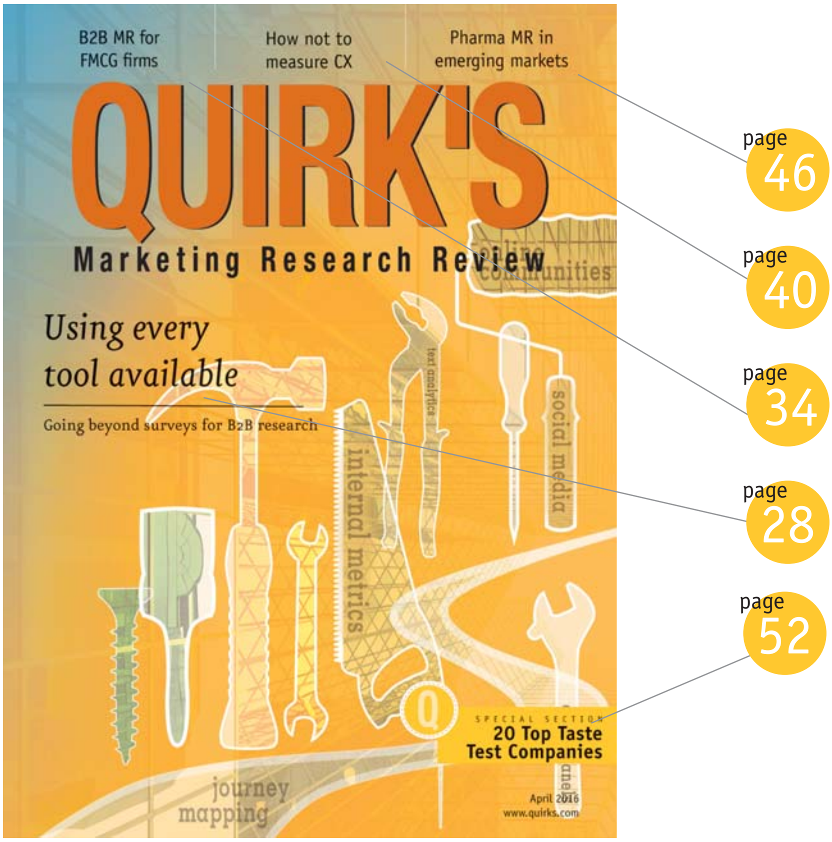

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Buzz from the #QuirksEvent 2016

We had 1,247 registrations for the #QuirksEvent in Brooklyn, N.Y., and attendees were all a-Twitter during the second annual Quirk's Event on February 23 and 24. We asked you to share your thoughts throughout the event and we were humbled by the overwhelmingly positive tweets!

Attendees shared tidbits during event sessions:

@EmilyJBunce
Key takeaway from #QuirksEvent is the need to present #insights through #storytelling. Thanks for a great conference @QuirksMR

@maartenbossuyt
Data needs to meet opinion – not beat it! Power of #mrx and #BigData in the mix. #QuirksEvent

@KarenTibbals
#QuirksEvent @BrianLey Challenge: find a way to do more strategic research with zero based budget by getting rid of sacred cows

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

@paul_long
To the organizers of the #quirksevent great job on organizing your 2016 conference! #mrx

@Marketing MJR
Thanks for hosting a great event! It was a pleasure speaking at the event today! #QuirksEvent #mrx #marketresearch

A huge thank-you to everyone who joined in on the #QuirksEvent conversation! If you haven't already, follow us on Twitter @QuirksMR.

// E-newsworthy

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••• respondent satisfaction

Don't come knocking, MR firms

Door-to-door research is viewed by consumers as the least-acceptable means to contact participants for research studies, according to a survey by Charlotte, N.C., firm Accelerant Research, with 57 percent of American consumers surveyed saying it is completely unacceptable. Telephone invitations – particularly robocalls – followed, with 44 percent saying it is completely unacceptable to contact participants for research studies via mobile phone and 43 percent saying it is completely unacceptable to contact them via landlines. Telephone survey invitations from a live operator are perceived as less invasive than robocalls (40 percent completely unacceptable to mobile and 35 percent completely unacceptable to landline) and calls to a landline are more acceptable than to a mobile phone, in general. Text-messaging was found to be less invasive, with 26 percent saying it is completely unacceptable. The least-invasive means to solicit survey feedback are via U.S. mail, point-of-sale (POS) printed receipts and e-mail invitations, with fewer than 5 percent of consumers finding any of these methods to be completely unacceptable. Of course, sometimes researchers have no choice but to use a more invasive survey method in order to complete a study. But when doing so, it's critical to always be sensitive to the respondent's time and convenience.

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••• technology research

Consumers talk tech pros and cons

A survey from Experian, Costa Mesa, Calif., shows that consumers appreciate how much technology has approved their lives but they are still concerned about privacy. Eighty-three percent of survey respondents agree that technology has enhanced their daily life in areas such as connecting with the people they care about (51 percent) and gaining access to knowledge or education (50 percent). Thirty percent of those surveyed say technology helps their financial status and 33 percent say it allows them to be more engaged with the products they use. Eighty percent say they would be even more connected, if possible, than they are today. However, only 36 percent of survey respondents review privacy policies when notified of changes by institutions they do business with and 28 percent review privacy policies of mobile apps before downloading them. Ninety-three percent feel identity theft is a growing problem, while 91 percent believe that people should be more concerned about the issue. Online activities that generate the most concern include making an online purchase (73 percent), using public Wi-Fi (69 percent) and accessing online accounts (69 percent).


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Trade Talk

By Joseph Rydholm, Quirk's Editor

(Im)proving MR's relevance at the Quirk's Event

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Joe Rydholm can be reached at joe@quirks.com

At the time of this writing it's just a few weeks removed from the 2016 Quirk's Event in Brooklyn. A big thanks to everyone who attended and for all of the feedback – overwhelmingly positive and otherwise! – the Quirk's team received while we were there. So much work goes into a conference like ours and once it's in progress, it seems to go by so fast – too fast!

While the details are reasonably fresh in my mind, I wanted to recap some nuggets from a few of the sessions I was able to attend. Exploring ways to increase or maintain the relevance of the internal insights function was certainly something we tried to steer presenters toward as often as we could and I think they delivered quite well on that front!

It was fascinating to hear how Boston Children's Hospital (BCH) conducted research about itself as a brand and how what it learned was surprising and led to system-wide changes. Health care choices can be so important and life-altering that it almost seems to trivialize health care providers by thinking of them in terms of brands, as if one's choice of hospital was on par with one's choice of soft drink. But like any soft drink or other consumer product, BCH found that it had certain attributes associated with it and the research showed there was worthwhile work to be done in educating the market about its other capabilities that were not currently top-of-mind for consumers.

Constant Contact's Rachel Krug presented a case study on some research conducted by the firm's digital advertising solutions team and offered some sage advice for researchers of all stripes: stick to metrics that are comparable, understandable and actionable – avoid vanity metrics that will only go up and thus offer no real useful data on the performance of the company or the campaign you are trying to measure.

In a very enjoyable presentation, Lesleigh Campanale of the Institute of Electrical and Electronic Engineers (IEEE) outlined how the IEEE used Webcam interviews and mobile journaling to understand engineers' daily pain points and how IEEE fit into their lives, with the goal of developing new features or services that could increase IEEE's relevance to engineers. As a group, engineers would seem to be at the top of any list of people least likely to agree to participate in marketing research so it was refreshing to see that the project not only engaged the engineers throughout but also produced a trove of valuable insights.

Colin Frolich, product marketing manager at Lyft, outlined how an agile research process helped Lyft make fast decisions on the pricing and marketing of its Lyft Line offering. A promotion offering $5 rides was very successful and the firm has found that the cohort who used Lyft under the Lyft Line program has shown great retention.

One of the best talks I sat in on was by Brian Ley, Valspar's director of consumer and marketplace insights. In a fast-moving 30 minutes he detailed how he has helped bring the company's insights function, which didn't exist before 2014, to an admirable level of internal relevance. Part of that process was training internal stakeholders to articulate their insights requests in terms of their own "whys" – that is, why are we undertaking this study and what specific decisions is this project meant to inform? Thirty percent of the 2013 consumer insights budget went to "sacred cow"-type MR projects, Ley said, and proving his function's relevance meant not being afraid to change or walk away from what had typically or always been done. Increasing a research department's relevance also means piloting and adopting new insights-gathering technology on a regular basis, he said, with the thinking being that if the insights team doesn't adopt the technology, some other internal team or department will.

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••• customer experience

Customers: We work harder than companies to fix problems

What's wrong with this picture?

When a customer service issue arises, it's generally agreed among the C-suite that their company is doing a good job at resolving it. However, new research from Ipsos Loyalty reveals that isn't exactly true. The study, which covers seven sectors across the U.S., found that, all too often, customers believe they are putting in more effort than companies to get things resolved following a complaint or negative incident.

According to the study, companies are missing the mark when it comes to how they deal with a customer problem. Six in 10 (65 percent) customers felt they had to put in a lot of effort to get an issue resolved. Slightly less (50 percent) perceive that companies have made little effort to resolve the issue. In six in 10 cases, customers think that they have had to put more effort than companies to sort an issue.

"These numbers are sobering," says Jean-Francois Damais, deputy managing director, global client solutions at Ipsos. "And especially to companies that have invested an enormous amount of time and resources to improving the customer experience. Strikingly, in one of three cases companies aren't even aware of complaints when they do happen. To help address this, companies need to start implementing measures to collect and analyze customer data."

The study shows that the effort customers make to resolve an issue has a significant impact on their loyalty to a brand. Specifically, when customers think they have put in more effort than companies, they are four times more likely to use the company less or stop using it entirely. They are also about twice more likely to complain to the company.

Not only do incidents have an impact on repeat purchase and behavior, they also have a significant ripple effect via social networks and word of mouth. Customers who feel they work harder than companies to solve an issue are over three times more likely to share their negative experience on social media and two-and-a-half times more likely to tell friends and family about it. Clearly, one unhappy customer can influence many more.

Ipsos has developed a metric – the Customer:Company effort ratio – which measures the perceived customer and company effort following a negative experience or complaint. Interventions following a customer issue or complaint can be a way for companies to optimize the ratio and keep their customers coming back. When a company has intervened following a negative experience, the Customer:Company Effort ratio is 1.7 times lower than when a company has done nothing. This lower ratio score leads to a propensity to use the company in the future which is approximately 3.8 times higher.

These are some of the findings of an Ipsos Loyalty survey conducted in January 2015. For this survey, a sample of 10,061 interviews were conducted via Ipsos online panels among U.S. customers in seven sectors who have experienced a critical incident (i.e., a good or bad experience) in the recent past. Quotas were set to balance the sample on key demographics to ensure that

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the sample composition is representative of the U.S. population. The margin of error is +/- 1 percentage point at 95 percent C.I. but can be wider among subsets of the population. All sample surveys may be subject to other sources of error, including but not limited to coverage error and measurement error.

••• food research

San Francisco named top foodie city in the U.S.

Bridgeport and Barnstable too?

California is home to three of the top 10 foodie cities in the United States, according to a new study by Omaha, Neb., marketing firm Infogroup. By measuring six indicators from its business and consumer database Infogroup has identified where the country's biggest foodies live. After defining a foodie city using consumer preferences and business frequency for eating in and dining out, Infogroup used its business database and consumer database to identify the cities with the highest "foodie score."

"Eating in" indicators included three factors. The first one is a model pinpointing a consumer preference of cooking for fun (measured from responses to an external consumer survey). The second factor is identifying high-end, specialty and organic grocers per 10,000 residents. The third is measuring the percentage of grocers that are high-end, specialty and organic. Although seemingly similar, Infogroup made the distinction between the second and third indicators to account for cities that have an unusually high number of grocery stores.

"Dining out" indicators included a model demonstrating consumers' propensity to eat at fine-dining restaurants as opposed to fast-food or family-dining chains (measured from responses to an external consumer survey), single-location restaurants per 10,000 residents and percentage of restaurants that are single-location.

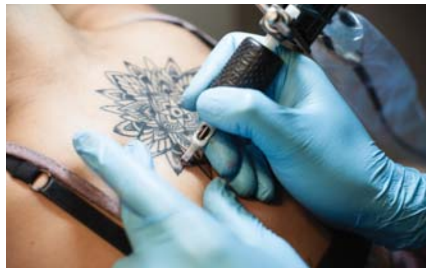
After compiling these factors, Infogroup ranked the following as the top 10 foodie cities in the U.S.:

1. San Francisco
2. Santa Cruz, Calif.
2. Bridgeport, Conn. (tied with Santa Cruz, Calif.)
4. Barnstable, Mass.
5. Ocean City, N.J.
6. Boulder, Colo.
7. Santa Fe, N.M.
8. Trenton, N.J.
9. New York City
10. Santa Rosa, Calif.

Tourists from across the country travel to San Francisco to go on dedicated local restaurant tours. A strong showing in the top five for both measures of grocers and a top 10 finish in the dining propensity model pushed the city over the top as the nation's top foodie city. This is further demonstrated in the firm's TargetReady Models, which show a high consumer preference for specialty organic stores.

To get a better idea of what a foodie city looks like, Infogroup investigated the occupations most positively-related to high foodie scores. The top five positive correlations were yoga instructors, real estate management, graphic designers, architects and Website design service.

Infogroup also analyzed other consumer attitudes and behaviors that may be related to foodies, along with the TargetReady Cook for Fun Model. Top TargetReady Models include foreign travel for vacation, frequent business travelers, heavy Internet buyers, online investment trading and higher educations. This indicates foodie cities are comprised in large part by young and wealthy residents.



••• lifestyle research

Americans growing more comfortable with tattoos

Regrets, they've had a few

Tattoos can take any number of forms, from animals to quotes to cryptic symbols, and appear in all sorts of spots on our bodies – some visible in everyday life, others not so much. But one thing's for sure: more and more Americans are getting them. According to a Harris Poll, about three in 10 Americans (29 percent) have at least one tattoo, up from roughly two in 10 (21 percent) just four years ago. What's more, few inked Americans stop at one; among those with any tattoos, seven in 10 (69 percent) have two or more.

Tattoos are especially prevalent among younger Americans, with nearly half of Millennials (47 percent) and over a third of Gen Xers (36 percent) saying they have at least one, compared to 13 percent of Baby Boomers and one in 10 Matures (10 percent). Millennials and Gen Xers (37 percent and 24 percent) are also exponentially more likely than their elders (6 percent Baby Boomers, 2 percent Matures) to have multiple tattoos.

Some other interesting comparisons: rural (35 percent) and urban (33 percent) Americans are both more likely to have a tattoo than suburbanites (25 percent); those with kids in the household are much more likely than those without to be sporting at least one tattoo (43 percent vs. 21 percent); political persuasion doesn't seem to factor into the decision to get a tattoo, with little difference between Republicans, Democrats and Independents (27 percent, 29 percent and 28 percent).

With tattoos on the rise, regrets have risen as well; though a strong majority still has no regrets, nearly one-fourth (23 percent) of those with tattoos say they ever regret getting one, up from 14 percent in 2012.

Top-ranked regrets (collected in an open-ended manner) include: too young when they got the tattoo; personality changes/doesn't fit my present lifestyle; got someone's name that I'm no longer with; poorly done/doesn't look professional; and isn't meaningful.

A third (33 percent) of inked adults indicate having a tattoo has made them feel sexy (up marginally from 30 percent in 2012). Roughly a third also say that it makes them feel attractive (32 percent), though it's worth noting that this percentage has grown considerably from 21 percent in 2012. Just over a quarter (27 percent) say it makes them feel more rebellious and 20 percent feel more spiritual as a result of their tattoos. Fewer say it makes them feel more intelligent (13 percent), respected (13 percent), employable (10 percent) and healthy (9 percent).

Perhaps the more important learning, though, is that most say that having a tattoo hasn't made them feel any different on any of these measures.

Opinions differ more broadly among those without tattoos. Nearly half (45 percent) feel those with tattoos are more rebellious than those without, though it's worth noting that this percentage continues to decline (54 percent held this belief in 2008; 50 percent in 2012), likely a byproduct of tattoos' continued trend toward the mainstream. On the other end of the scale, nearly half feel those with tattoos are less attractive (47 percent) than those without, 44 percent feel they're less sexy and a third (34 percent) believe them to be less respectable. Meanwhile, between a quarter and three in 10 think those with tattoos are less intelligent (29 percent), healthy (28 percent) and spiritual (25 percent).

Further driving home the message of tattoos going mainstream, majorities of Americans would be comfortable seeing a person with visible tattoos serve in roles across a diverse range of industries and professions. Comfort ranges from highs of 86 percent for athletes, 81 percent for IT technicians and 78 percent for chefs, to lower majorities of 59 percent each for primary school teachers and judges, and even 58 percent for presidential candidates.

More specifically, many Americans – particularly Millennials – would be "extremely comfortable" with someone with visible tattoos in these professions, including police officers (39 percent, including 54 percent of Millennials), real estate brokers (37 percent/52 percent), bankers (36 percent/50 percent), doctors (35 percent/51 percent), judges (34 percent/49 percent) and presidential candidates (32 percent/46 percent).

That's all well and good but parents are likely to have a whole different set of standards when it comes to who interacts with their kids, right? Wrong. In fact, a separate poll of parents with kids under 18 in the household found that strong majorities are comfortable (roughly four in 10 of them "extremely" so) with people sporting visible tattoos serving in a number of positions that involve interacting with the kiddos: coach (81 percent comfortable, 39 percent extremely comfortable); high school teacher (75 percent, 39 percent); camp counselor (73 percent, 36 percent); sitter/caregiver (73 percent, 37 percent); primary school teacher (71 percent, 37 percent); and pediatrician (71 percent, 40 percent).

This Harris Poll was conducted online within the United States between October 14 and 19, 2015, among 2,225 adults (aged 18 and over). Additional polling was conducted online in the United States between November 6 and 16, 2015, among 1,093 parents (aged 18 and over) with children under 18 in the household. 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. Respondents for this survey were *selected from among those who have agreed to participate in Harris Poll surveys. The data have been weighted to reflect the composition of the adult population. Because the sample is based on those who agreed to participate in our panel, no estimates of theoretical sampling error can be calculated.*

••• technology research

Second screens are on the scene

Millennials lead in usage of them

More than three-quarters (88 percent) of Millennials engage in second-screen behaviors when watching video content, the highest percentage of any demographic, according to a new study from the Consumer Technology Association (CTA), formerly the Consumer Electronics Association. The report, 2015 Video Consumption Trends: Part 1 and Part 2, explores consumer video device and content preferences and consumption trends.

While watching video content, half of online Americans use second screens via another device such as a smartphone or tablet to augment first screen content to: access information about the content they're viewing (50 percent), watch content on other devices during commercials (48 percent) and follow social media discussions either related or unrelated to the programming (43 percent). Millennials (ages 18 to 34) are far more likely to engage in second-screen behaviors than adults age 35 and older – 71 percent engage with social media while watching video content (40 percentage points higher than adults 35 and older) and 70 percent watch content on another device during commercials (32 points higher than adults 35 and older).

"More than ever before, consumers – especially Millennials – are using non-traditional devices such as computers, tablets and smartphones for content viewing," says Steve Koenig, senior director of market research, Consumer Technology Association. "As technology continues to improve, consumer behaviors and expectations also evolve but televisions still reign as the preferred viewing device in American households today."

While television remains the most-preferred device for viewing most video content, screens on other devices (computers, tablets and smartphones) are preferred collectively for watching streamed content (57 percent, 13 points higher than televisions). For most types of video content, Millennials are more likely to watch from non-traditional devices (42 percent) compared to adults 35 and older (22 percent).

Overwhelmingly, the top reasons consumers purchase televisions rather than non-traditional content-viewing devices are screen size (80 percent) and picture quality (62 percent), with cost coming in at a distant third (29 percent).

One in 10 consumers (11 percent) reports having cancelled his or her service provider subscription in the past year, usually citing alternate options available at a lower cost (27 percent). Additionally, 21 percent of consumers report they haven't had a service provider subscription for more than a year, with many (32 percent) reporting they did not watch enough TV programming to justify the subscription costs. While traditional pay-TV providers including cable, satellite and fiber-to-the-home remain the most-used resources for accessing and consuming content (61 percent), more consumers are now receiving content through paid video streaming services (46 percent, a seven percentage point increase from 2014).

CTA research projects revenues will reach $19 billion for all TV sets and displays in 2016, on par with 2015, as volumes drop 1 percent to just under 40 million units. Driven in part by the market introduction of next-generation technologies, 2016 will be a phenomenal year for 4K ultra high-definition (UHD) TVs with shipments of 4K UHD displays projected to reach 13 million units (an 83 percent increase), with revenue expected to top $10 billion.

••• technology research

Study looks at Web app development trends

Fast waterfall vs. agile

Testing Trends in 2016: A Survey of Software Professionals, conducted by Dimensional Research, Sunnyvale, Calif., for San Francisco-based automated testing firm Sauce Labs Inc., reveals that while 88 percent of organizations developing Web applications say they have adopted agile development, only one in five have fully implemented the five best software testing practices typically associated with a mature agile development process.

The report represents the company's second annual "state of testing" research report and is designed to better understand current trends in delivering high-quality Web and mobile applications. Covering topics such as agile software development, modern testing techniques, continuous integration (CI) and cross-browser test coverage, the report stems from a survey conducted in December 2015 of more than 520 technology professionals responsible for the quality of software applications.

"Development teams continue to adopt agile methodologies like continuous integration to build better software faster," says Charles Ramsey, CEO of Sauce Labs. "What is surprising from this report is the revelation that many teams who believe they are practicing an agile testing process are really performing 'fast waterfall' instead. This presents a huge opportunity for these teams to continue to improve their processes, increase their use of automation and accelerate development even further."

In addition to revealing the prevalence of fast-waterfall development, the findings also reveal that the market continues its adoption of CI, with 77 percent of respondents citing use of the modern development technique within their teams, up from 70 percent from last year. Importantly, the research also reveals that these teams are beginning to reap the benefits of continuous integration, with respondents reporting that implementing CI has resulted in more systematic and rigorous testing, the introduction of more new features for rapid customer feedback and writing code with fewer errors.

Cross-browser testing also remains important, with 95 percent of large companies performing some type of cross-browser testing. In addition, Microsoft's new browser released in August 2015 is already grabbing the attention of developers with almost one-third of respondents saying they test their applications on Microsoft Edge.

Additional key findings from the report include:

Agile is ubiquitous but few have fully embraced testing best practices: 67 percent of respondents say their teams deploy new builds at least weekly; 46 percent say they want a faster deployment time than they currently have; only one in five say (21 percent) their teams have achieved all five key areas of agile testing maturity, including: 23 percent of teams fix bugs right away, 24 percent iterate small testable requirements rather than waiting for features to be complete, 26 percent of teams have more automated testing than manual, 77 percent of development and QA teams communicate in real-time and 86 percent of development and QA teams think of themselves as partners.

Continuous integration changes testing: More respondents acknowledged the benefits of CI compared to 2015, which include: more rigorous testing (33 percent), trying more features for customer feedback (32 percent) and writing code with fewer errors (21 percent) in the current report.

Cross-browser testing remains important, especially for large organizations: 95 percent of large companies perform cross-browser testing compared to 86 percent of small companies; 68 percent of large companies test on older browser versions versus only 60 percent of small companies; 32 percent of respondents say they test applications on Microsoft Edge; the need for Internet Explorer testing has not decreased in past year.

"Development teams are beginning to see real benefits of implementing continuous integration," says Diane Hagglund, principal researcher of Dimensional Research. "The report reveals that while certain benefits may not be seen immediately, there are considerable long-term advantages to CI that make its adoption worthwhile." The full report can be downloaded at http://bit.ly/1VQDNjh.

A global database of software professionals responsible for the quality of Web applications was e-mailed an invitation to participate in a Web survey on the topic of testing trends. A total of 520 individuals completed the survey. Participants included a variety of roles, company sizes, industries and regions. A copy of this report was offered as an incentive for participation. Certain questions were repeated from a similar survey conducted with the same audience one year ago to capture changes.

••• restaurant research

Chick-fil-A nabs restaurant experience award

Other winners expanding into new markets

Small fast-food chains that have long been local favorites are expanding to new markets and in the process gaining customers and redefining what consumers expect from fast-food restaurants. These chains have an outsized impact on fast-food perceptions and expectations according to restaurant market intelligence firm Sandelman with the announcement of the winners of the firm's 2015 Quick-Track Awards of Excellence.

"Some of the chains on our Awards of Excellence Top 10 List may not be known yet by those outside their local markets but their seeming overnight success has really been decades in the making," says Bob Sandelman, founder and CEO of Sandelman & Associates.

The 2015 winner of the Overall Award of Excellence is Chick fil-A, with 63 percent of its users rating their last experience excellent overall. It wasn't long ago that Chick-fil-A was a regional favorite but it has rapidly expanded to become a national player. California favorite In-N-Out is a close second, with a 61 percent overall excellent rating. Chick-fil-A and In-N-Out have traded places at the top of the list over the past several years. The Top 10 List is filled with expanding fast-food chains that are changing the way consumers think of fast food.

Top 10 Quick-Service Restaurant Chains
(ranked by percent rating their overall experience excellent)

Chick-fil-A	63%
In-N-Out Burger	61%
Portillo's	60%
Dion's	59%
The Habit Burger Grill	59%
Café Zupas	58%
Raising Cane's	57%
Cafe Rio	56%
Capriotti's	56%
Five Guys	54%

Sandelman's Quick-Track syndicated usage and perception study monitored over 1 million quick-service restaurant occasions across large and small markets throughout the country in 2015. The 2015 leaders are expanding from a market or region into new areas. For example, Portillo's has long been a Chicago area favorite, starting as a hot dog stand in 1969 and morphing over the years into a chain of fast-casual restaurants featuring hot dogs, hamburgers, barbecue, salads and more. The chain is expanding to California and Arizona.

Dion's has been serving pizza and subs in Albuquerque since the 1970s and is now gaining recognition as it expands to Texas and Colorado. The Habit began for many in Santa Barbara, Calif., with premium char-grilled burgers but now they are found all over California and the West. There are also outposts in New Jersey, Florida and Virginia.

Past Awards of Excellence winner Raising Cane's is a leading provider of chicken fingers in Louisiana that is rapidly gaining rave reviews in Texas, Oklahoma, Nevada, Kentucky, Ohio and now California.

Utah is a hotbed for fast-casual restaurants with Café Zupas and Café Rio both tracing their origins to the area. Café Zupas focuses on house-made soups, salads and sandwiches, while Café Rio serves up fresh Mexican food. These chains are the youngest of the bunch, having started in 2006 and 1997 respectively. Both chains have expanded in the intermountain area and beyond.

Capriotti's started selling fresh roasted turkey sandwiches in Delaware in 1976. Now you'll find them springing up in the Atlantic seaboard, Nevada and other Western states. Five Guys Burgers and Fries continues to have a strong presence in Washington, D.C., where it started in 1986, but it has also expanded to over 1,000 units across the country.

"The common theme among these chains is their ability to provide a consistently excellent experience for their users at a single restaurant and then replicating that experience to lots of restaurants in a market and then across the country," says Bev Cain, president of Sandelman.

Quick-Track monitors satisfaction on 17 individual attributes that contribute to overall satisfaction. Chain winners on individual attributes include Chick-fil-A, In-N-Out Burger and Café Rio from the top 10 overall list, as well as Little Caesars Pizza, Jason's Deli, Penn Station, la Madeleine, Cook-Out and Jimmy John's. All of the winners can be seen at www.sandelman.com/awards.

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Product and Service Update

••• millennials research

Tool interprets Millennial marketing language

Tracks emotions

Viacom Velocity, the integrated marketing and creative content team for New York media company Viacom, has partnered with Canvs, a New York-based technology platform that measures and interprets emotionality in language, to interpret Millennial language in marketing campaigns. Velocity's updated Echo Social Graph product, Viacom's proprietary tool that measures the effectiveness of custom creative marketing campaigns, will integrate Canvs' emotional analysis to deliver insights to marketing partners about the consumer impact of a campaign. Canvs' capability tracks a broad range of 56 unique emotions versus the three general feelings – "positive-negative-neutral" – typically tracked by sentiment analysis. Canvs' database is also keyed into Millennial slang and social media language.
www.velocityviacom.com

quirks.com/articles/2016/20160404.aspx

••• DIY research

Socratic Technologies debuts free survey platform

Cloud-based, self-service offering

San Francisco online research firm Socratic Technologies Inc. has released the Q-Oasis survey research platform to its clients in a cloud-based, self-service offering. Q-Oasis users will have access to create online surveys for free with no arbitrary limits on the number of questions, responses or respondents. The Q-Oasis platform interface is a fully responsive design that optimizes for desktop, tablet or mobile devices depending on what the respondent is using. When desired, clients can upgrade specific survey questions to add gamified functionality and engage users using drag-and-drop card sorts for rating, ranking, allocation, deconstruction or categorization. Additionally, tools like the Socratic Concept Highlighter or Socratic CollageBuilder are also available. In addition to the ability to drop in gamified tools, when clients need specific, high-level but common analytical components like segmentation, Configurator Analysis, max-diff or other advanced multivariate statistical procedures, Socratic's data scientists are available to support the design and analysis of these techniques. Socratic has begun accepting requests for its closed beta program at www.q-oasis.com.

••• research tools

Research Now beta-testing templated suite of surveys

Concept testing, A&U, brand health

Plano, Texas, firm Research Now has begun beta-testing a suite of quick-turn market research products. The automated research solution is a templated suite of surveys, enabling market researchers, brand managers and other business professionals to execute studies faster than traditional research methods. The user-accessible survey templates deploying in the beta test are designed to improve the overall client experience and are based on common study types including concept testing, attitude and usage, brand health, employee culture, creative testing, share of wallet and customer satisfaction. Clients will have access to insights from Research Now's online panel respondents and will receive support and oversight from a Research Now client support person. The beta test of the solution suite will launch with a select group of Research Now clients, followed by staged releases in the Americas, EMEA and APAC.
www.researchnow.com

••• shopper insights

New e-commerce offering from IRI

Understand shopper motivations, competitive threats

Chicago-based researcher IRI has made available its new proprietary E-Commerce Engagement Offering, a component of its e-commerce consumer and shopper insights service. By leveraging data and insights from multiple sources, CPG manufacturers and retailers can determine which brands and channels have opportunities for e-commerce-based growth, as well as understand which brands and segments are most vulnerable to competitive threats presented by e-commerce. The e-commerce service also enables manufacturers and retailers to understand motivations for shopping online, expectations relative to services and attributes and expected level of usage change during the next 12 months. IRI provides these insights within consumer target groups as defined by the manufacturer or retailer. It also creates a benchmark of all metrics versus the total and versus competitors.
www.iriworldwide.com

••• health care research

Mobile app researches patient experience

Kantar Health, Lumi Technologies partnership

New York health care consulting and research firm Kantar Health has partnered with audience insight technology firm Lumi Technologies to create a mobile survey app to gain insights into the patient experience. The Kantar Health mobile app conducts short surveys, collects picture and video content and collects biometric and activity data from a range of mobile health technologies and wearable devices. Other features of the app include bar code scanning, voice-to-text audio capture and GPS/location capture. In addition, the app will facilitate key research objectives, such as in-the-moment feedback on specific patient or caregiver events, as well as longitudinal engagements and the ability to engage the same respondents multiple times during the course of a year.
www.kantarhealth.com

••• telephone research

New manual dialing system from Marketing Systems Group

Addresses FCC clarifications to TCPA

Horsham, Pa., research firm Marketing Systems Group has released U-Dial, its manual dialing system that was designed to address the FCC clarifications (to the original TCPA) released in June 2015 on the use of Automated Telephone Dialing Systems. U-Dial provides monitoring, quality-control and recording functions for call centers and survey management and allows supervisors to manage interviewers with full silent monitoring. U-Dial also has recording options and can be set to record complete interviews or select questions and can play prerecorded sound files through the phone to the respondent. U-Dial is compatible with SIP or analog/digital telephony networks.
www.m-s-g.com

••• online research

Market Cube, SociaLabra partner for online research service

Can use text, rich media

Market Cube, a Charleston, S.C., online audiences and research support services provider, and Toronto-based software developer SociaLabra have partnered to deliver Market Research Cloud, an online research service that provides audiences, community-building and management tools and other integrated capabilities. It enables researchers to recruit audiences through a global network of market research panels, add their own audiences or use links in social networks, Web sites and messaging to obtain poll and survey responses. Its survey tool enables researchers to use text and rich media in questions. Researchers can also use their own survey tools with the audiences provided. Additionally, a community-building and management tool is incorporated for qualitative studies. Preset reports are included that can track study results and provide presentation of data. Study data can also be exported to third-party analytics software.
market-cube.com

••• Briefly

■ Iselin, N.J., firm Schlesinger Associates has launched MedQuery|Advisors. Following Schlesinger's acquisition of Chicago-based data collection firm MedQuery in October, MedQuery has now merged its medical recruitment operation with Schlesinger Advisors' capabilities to provide a single specialized solution for projects presenting health care recruitment. Chris Lee will serve as executive vice president of MedQuery|Advisors and Matt Campion, who previously headed up Advisors by Schlesinger, has been appointed executive vice president of

Schlesinger Quantitative Solutions.
www.schlesingerassociates.com

■ Portland, Ore., technology company Dialsmith has released its report of second-by-second ratings results of the 2016 Super Bowl ads based on over 3,000 ratings collected with its Slidermetrix tool, which allows viewers to continuously rate an ad as they view it using an on-screen slider with a scale from 0 ("Hate It!") to 100 ("Love It!"). The average of each viewer's slider position during every second of the ad results in a cumulative mean score for that ad, which determines each ad's ranking in the report. Honda's "A New Truck to Love" received the highest rating and Scientology's "Who Am I?" received the lowest rating.
www.dialsmith.com

■ San Francisco software firm Prism has launched Insights, a mobile application that enables retailers to access data about store performance, as well as visual access, which provides low-bandwidth imagery from store cameras, directly to users' iOS and Android devices. In tandem with the new mobile application, the firm is also rolling out Custom Reports, which are comprehensive self-service reporting capabilities, alongside the ability to integrate external data streams into dashboards and reporting.
prism.com

■ Canada-based firm Bond Brand Loyalty has launched SynapzeINSTANT, an app-based solution for banks with a credit card loyalty program that allows customers to use loyalty points to pay in-store or for online purchases at participating retailers. When the cardholder redeems points, the cash amount is reimbursed on their credit card statement. In addition, when a customer is near a store aligned with the program, the app's location-based and push notifications will alert the customer about redemption opportunities.
www.bondbrandloyalty.com

■ The Media Technology Monitor, a research product of the Canadian Broadcasting Corporation, has released its Sneak Peek Report, available via Sweden-based technology company Dapresy's online dashboard.
www.mtm-otm.ca

■ Partners+simons, a Boston-based integrated marketing services firm, has launched a new trust measurement model being rolled out to health care clients. The model is based on the firm's National Healthcare Trust Index, which launched earlier this year and analyzes consumer trust levels and drivers for health plan and hospital selection. The new measurement model will enable health plan providers and hospitals to have greater visibility and insights into where their organization ranks on the components of trust – ability, integrity and benevolence – as measured against the national benchmark set by the Trust Index.
partnersandsimons.com

■ Charleston, S.C., online sample and research operations company Market Cube LLC was granted the rights to represent and sell Platnijopros, a Russian survey panel owned by SurveyEveryone Group, on January 28. As a result, Market Cube will be able to add to its panel services, allowing the company to build panels with Russian respondents in accordance with Russia's Data Localization Law.
market-cube.com

■ Chicago-based firm Doyle Research Associates has released *A Guide to Qualitative Path-to-Purchase Research*, a 10-page e-book that can be downloaded for free from the firm's Web site.
doyleresearch.com

■ Salt Lake City researcher MaritzCX has launched CXEvolution, a framework for assessing, measuring and prescribing actions that link customer experience maturity with financial outcomes.
www.maritzcx.com

■ Canada-based incentives software platform 360incentives has re-branded as 360insights and has launched its Channel Success Platform, an analytics suite that allows companies to predict which incentives programs will perform best, along with when and where to run them. The company also recently announced $10 million of funding to support its work in the predictive analytics space.
www.360insights.com

■ NetBase, a Santa Clara, Calif., social analytics firm, has integrated and made available Facebook topic data as a new premium content source, allowing NetBase customers to access consumer insights based on the aggregated and anonymized stories and interests related to any topic, event, brand, competitor or industry being shared by active Facebook members. Marketers can also view consumer insights of roughly 60 attributes including country, language and topics, giving them access to self-declared demographic information of their consumers such as age, gender and location while aggregated insight into billions of interactions including posts, shares, likes, comments, tags, media types and links provides a foundation for audience marketing campaigns.
www.netbase.com

■ London-based firm Silverman Research, in partnership with London-based consumer goods firm Unilever, has launched Crowdoscope, a survey and discussion tool designed to obtain real-time social collective intelligence. By displaying comments in a visualization instead of a list, Crowdoscope helps large communities navigate discussions more easily so the best and most relevant comments can be identified.
www.silvermanresearch.com

■ London-based research firm BrainJuicer has formed a collaboration with London research tech firm ZappiStore to offer two of its research methodologies, BrainJuicer Ad Testing Express and FaceTrace, in ZappiStore's self-serve portal. Both solutions have launched in ZappiStore and are currently available in English-speaking markets.
www.zappistore.com

■ Interactive Video Productions, a Morganville, N.J., mobile research lab provider, has launched MobiLAB Integrated, a lab solution powered by

iMotions that combines and synchronizes responses to any type of stimuli, capturing behavioral and emotional measures from eye-tracking, facial coding, EEG, GSR, EMG, ECG and self-report surveys. Accompanied by an IVP System Operator, MobiLAB Integrated also offers lab solutions for a variety of research scenarios, including projects with screen-based stimuli, packaging, mobile devices, real-life environments or in-person interviews.
www.interactivevideo.com

■ Erdos & Morgan, a Syosset, N.Y., media market research firm, has released its 2015 Financial Advisor Media Outlook and Usage Syndicated (FAMOUS) Study, its annual study regarding the financial advisors market, which provides insights into the thought process and preferences of financial advisors with regard to their media consumption and knowledge of ETFs and fund families within the professional investment community.
www.erdosmorgan.com

■ Salt Lake City insight technology firm Qualtrics has released the Qualtrics Insight Platform, which was piloted by several customers, including JackThreads, MyFitnessPal, Overstock.com, Wheaton College and others. The platform allows organizations to manage customer experience, employee feedback and market research processes in a unified, cohesive way.
www.qualtrics.com

■ Nielsen, New York, has released details of its e-commerce measurement solution for the U.S market. The solution combines Nielsen retail data cooperators, multiple consumer-sourced data sets and demand-related analytics that will provide a measure of e-commerce channel performance for retailers and manufacturers. The retail data cooperators are across a spectrum of channels ranging from pure play, club, mass, specialty, drug and food. It will also provide an integrated view of consumer insights, in addition to the market measurement, through consumer-level purchase data. It will also offer insights into specific product sales and trends at major online retailers through the analysis of consumer purchase receipts received by e-mail and direct consumer reporting. Nielsen's e-commerce measurement solution will be integrated within its current suite of measurement services and will be available to U.S. clients later this year.
www.nielsen.com

■ Washington, D.C., firm Amtrak and Shelton, Conn., researcher SSI have launched a new loyalty program called Survey Points Club, allowing Amtrak to provide SSI and its clients access to travelers, including business professionals, consultants, influencers and lobbyists and customers. Additionally, Amtrak Guest Rewards members who enroll with Survey Points Club will earn Amtrak Guest Rewards points by participating in surveys and sharing their opinions. Amtrak Guest Rewards points can be redeemed for rail travel, entertainment, car rentals, hotels, cruising, dining, retail or gift cards.
www.surveysampling.com

■ In New York, audience measurement solution provider Verto Analytics has launched the Verto App Watch, a mobile app audience measurement solution that offers mobile app behavioral data with insights and real-time reporting. It provides hard measurement data for all mobile apps across all key operating systems and devices and equips app developers, digital publishers, gaming companies and investors with intelligence into mobile audience activity and visibility into competitors. App Watch metrics include time spent, session lengths, in-app monetization, demographics, retention, churn, in-app actions and funnel analyses.
www.vertoanalytics.com

■ Netherlands-based consumer insights and marketing analytics firm MetrixLab has made available a new digital analysis and reporting tool directly available to users. The tool enables users to access survey data early in the fielding process and track or participate with insights formation after the study closes. The firm has also incorporated visual customized reporting in addition to crosstabulation functionality, letting users customize images, titles and chart types. Data-mining capabilities have also been improved, allowing users to layer data, create custom variables and filters, employ multiple significance levels, combine prompts and highlight trending. The digital analysis and reporting tool is available now through the firm's insights platform.
www.metrixlab.com

■ Irvine, Calif., company MFour Mobile Research is adding Visa as an additional instant mobile payment option to its Surveys on the Go application, giving panelists more options when cashing out after reaching the $10 benchmark. During the fourth quarter of 2015, Amazon gift cards were added to the app, giving panelists an additional payment option beyond PayPal. Soon, panelists will be able to cash out through either Visa, Amazon gift card or through PayPal.
mfour.com

■ Reston, Va., firm comScore has launched Mobile Metrix in the Philippines for the reporting of mobile Web and app audiences on smartphones and tablets. Mobile Metrix allows publishers to demonstrate the size and value of their mobile audiences and helps media planners and advertisers to evaluate advertising opportunities on mobile devices. Mobile Metrix is also available in the following Southeast Asian markets: Indonesia, Malaysia, Singapore, Vietnam and Thailand.
www.comscore.com

■ Research firm B2B International now offers B2B Spotlight, a new video platform offering instant video capture and analytics. Respondents can use video to capture responses at any time across any device. Transcription technology allows videos to be transcribed quickly to uncover key themes and sentiments. Users can produce edited show reels from any number of responses to allow clients to see and hear the emotions and opinions of their customers.
www.b2binternational.com

How behavioral economics can help us understand conjoint results

| By Theano Anastasopoulou

snapshot

How researchers should incorporate the insights of Daniel Kahneman and Amos Tversky on decision-making into their conjoint studies.

One frequently-used statistical technique within market research is choice-based conjoint (CBC). Leaving aside its mathematical foundations and just thinking about its application, CBC is a questioning technique that uses bundles of elements that describe a product or a service. These bundles are presented to consumers and, in most cases, choices and purchase intentions are obtained. In a simple conjoint task, we would, for example, ask for a choice between two mobile phone package bundles, one at £8 a month including 500 texts and 200 minutes and another at £12 a month including 500 texts and 400 minutes. We would present different combinations of those elements in a series of bundle pairs and would obtain a series of choices.

A systematic production and testing of the series of bundle pairs allows us to understand the influence of each of the elements that make up the bundles. For example, we can test whether people are willing to pay more for extra minutes and, if yes, what premium they are prepared to pay for different levels of increased minutes included in the package.

When conjoint results are produced, a typical output would be the utility value associated with different options of number of minutes included in a package. (These utilities are the typical conjoint output and are measures of how appealing or wanted a specific level of an offer is. They are used to estimate uptake at a later step but are not a measure of uptake.)

It will be no surprise to a conjoint analyst or user that, in the hypothetical example shown here, although the number of minutes increases by equal steps of 200, the corresponding utility increase is not symmetrical and equal in every step. We would happily accept this finding, considering that we expect consumers to evaluate the minutes offered against the context of their mobile phone use and their needs. So it is reasonable to expect that offering 200 rather than no minutes at all would make a package significantly more appealing, while moving from 400 to 600 minutes is not considered to be appealing to a similar degree. It is also relatively easy to explain why moving from 1,000 to 1,200 inclusive minutes does not appear as appealing because many consumers would consider 1,000 minutes enough to cover their needs. A further increase is not necessarily perceived as sufficiently beneficial.

Number of minutes	None	200	400	600	800	1,000	1,200
Utility	0	30	45	55	65	75	80
Change in Utility		30	15	10	10	10	5

The above findings provide valuable insight to product managers and marketers designing product or service portfolios as they allow them to uncover the perceived value and desirability of different elements of their offer. It is important the test covers the full range of options

quirks.com/articles/2016/20160405.aspx

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USA

ATLANTA
Fieldwork Atlanta
Focus Pointe Global (Buckhead, Clairmont)
Murray Hill National
Plaza Research
Schlesinger Associates
Superior Research

BALTIMORE
AIM
Baltimore Research (Towson, MD)

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

CHICAGO
AIM (Schaumburg)
Adler Weiner (Downtown, Lincolnwood)
Chicago Focus
Fieldwork Chicago (Downtown, North, O'Hare, Schaumburg)
Focus Pointe Global (Downtown, Oak Brook)
Focuscope (Downtown, Oak Brook, Oak Park)
Murray Hill National
Plaza Research
Schlesinger Associates (Downtown, O'Hare)
Smith Research (Downtown, Deerfield, Oakbrook)
Survey Center
The Energy Annex

CONNECTICUT
MarketView (Danbury)
Murray Hill National (Hartford)
New England Marketing Research (Norwalk)
Performance Plus (Enfield)
Razor Focus (Stamford)

DENVER
Fieldwork Denver
Plaza Research

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

LAS VEGAS
Plaza Research

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

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

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

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

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

NORTH CAROLINA
L&E Research (Charlotte, Raleigh)

OHIO
AIM (Cincinnati, Columbus)
Complete Research Connection (Columbus)
Focus Pointe Global (Columbus)
L&E Research (Cincinnati)
Opinions, Ltd. (Cleveland)
QFact Marketing Research (Cincinnati)

PHILADELPHIA (Metro Area)
Plaza Research (Marlton, NJ)
JRA (Montgomeryville, PA; Mount Laurel, NJ)

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

PHOENIX
Fieldwork Phoenix (South Mountain)
Focus Market Research (Scottsdale)
Focus Pointe Global (Tempe)
Plaza Research
Schlesinger Associates

RHODE ISLAND
Performance Plus (Providence)

SAN DIEGO
Plaza Research
Taylor Research

SAN FRANCISCO
Fieldwork San Francisco
Focus Pointe Global
Nichols Research (Downtown, Concord, Fremont, Fresno, Sunnyvale)
Plaza Research
Schlesinger Associate

SEATTLE
Fieldwork Seattle (Downtown, Kirkland)
Northwest Insights

TEXAS
Austin Market Research
Fieldwork Dallas
Focus Pointe Global (Dallas)
Galloway Research (San Antonio)
Murray Hill National (Dallas)
Opinions Unlimited (Houston)
Plaza Research (Dallas, Houston)
Schlesinger Associates (Dallas, Houston)
Think Group Austin

VIRGINIA
Alan Newman Research (Richmond)

WASHINGTON, D.C. (Metro Area)
OMR (Greenbelt, MD; Washington, DC)
Shugoll Research (Alexandria, VA; Bethesda, MD; Fairfax, VA)

WISCONSIN
Focus Pointe Global (Appleton)
JRA (Milwaukee)

UNITED KINGDOM
Aspect in the City (Manchester)
Aspect Viewing Facilities (South Manchester)
Field Facts Worldwide/ Focus Pointe (London)
London Focus (London)
Shoreditch Studios (London)
The Research House (London, Wimbledon)

CANADA
Consumer Vision (Toronto)
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FRANCE
ConsuMed Research (Paris)
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GERMANY
Schmiedl Marktforschung (Berlin, Frankfurt, Munich)

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likely to be offered by a company in order to allow testing of all the possible alternatives and to establish their value. Another important recommendation is to repeat such an exercise at regular intervals, especially when there have been significant changes to the market. If, for example, most of the packages offer a minimum of 400 minutes, we would expect the loss of utility when moving from 400 minutes to a lower level to be higher than the increase in utility when moving from 400 to 600 minutes. If a year down the line the typical inclusive offer increases to 600 minutes we would expect a similar conjoint test to come up with different results. Consumers' needs constantly change and utilities of different offers are expected to reflect those changes.

From a pure economics point of view

Now let's move outside the market research mind-set for a moment and try to imagine that we approach this question from a pure economics point of view. Neoclassical economists using the "rational agent expected utility" theory tend to see people as rational agents that base their decisions on the objective value of an offer. If we tried to analyze the utility of each one of our inclusive minutes above rationally we would expect that the utility associated with increasing an offer by 200 minutes would be the same regardless of whether you move from 400 to 600 or from 200 to 400. In such a case, we could have tested the appeal of two levels having a 200-minute difference and extrapolate the utility change between them to all levels we want to examine. This would have saved us a lot of time and effort testing.

Any researcher would protest to such a suggestion as it would lead to inaccurate conclusions. It is interesting that something that may be unacceptable to researchers may have been perfectly acceptable to neoclassical economists. On the other hand, psychologists studying human choices would have sided with the market researchers.

Different disciplines may be working independently, completely unaware of practices and learnings in other disciplines. Psychologists studying human decision-making have been happily working independently of economists who were developing and using theories about economic behavior for years and never contributed or inputted to this development with their psychological behavioral insights. Then a team of psychologists, upon coming across the rational agent expected utility theory in economics, were surprised by how it conflicted with the sometimes irrational human behavior they observed in their research. These researchers decided to spend some time challenging the rational economic theory and put forward an alternative.

One of those psychologists was Daniel Kahneman, who in 2002 was awarded a Nobel prize for his contribution to the field of economics; this contribution mainly originated from his influential work on prospect theory, which was the response to economic models of the time (his collaborator on this theory, Amos Tversky, unfortunately passed away six years before the Nobel was awarded). The significance of this Nobel is indicated by the fact that the only other psychologist awarded a Nobel was Pavlov (and he may even be considered as a biologist).

A more accurate explanation

Although prospect theory applies to a very specific task, what Kahneman and Tversky achieved was to offer a more accurate explanation of human decision-making that takes into account certain cognitive features that underlie human decision making. The main contribution by their theory was the introduction of a reference point that humans use and is very important when coming to a decision; this reference point is determined by current circumstances or the context for their decisions. Their work was groundbreaking as it demonstrated in a powerful way how psychology can inform the field of economics. This was one of the key milestones in the development of behavioral economics, seen by some as a revolution in economic theory as it has since brought other fields like psychology, sociology and political science into the field of economics.

Prospect theory is mainly based on three key cognitive features. As mentioned earlier, evaluation against a reference point is one of the key cognitive features. In our conjoint example, a reference point that underlies a decision is that a consumer shopping for a mobile package expects at least some minutes to be included in the package rather than none, so it is not surprising that offering fewer minutes than the reference point or none at all will make the package unappealing. Another key cognitive feature described by prospect theory is loss aversion. If most packages offer 400 minutes, then the majority of consumers are likely to have this in their current package. Therefore, a reduction from this level is likely to lead to a larger utility reduction than an increase from this level of a similar magnitude. Finally, another key cognitive principle is this of diminishing returns. An increase of 200 minutes from a starting point of 1,000 is less attractive than an increase from a starting point of 400.

Design tests reflecting current expectations

The same principles will apply to testing of any product attribute. When we design product profiles in any sector (whether it is consumer products, business-to-business services or health care therapies) it is important to identify current expectations or accepted norms and then vary our options around this norm (also considering that these may differ by subgroup). It is important to test the effect of realistic levels of increases as well as decreases versus these norms and make sure we design tests reflecting current expectations.

Finally, new product launches that are likely to significantly move current benchmarks will need a different questioning and modelling approach: a different questioning approach to ensure the new reality is clearly described and reflected by our respondents before they give us their preferences and that we are realistic in how many and which variations of the future competitive landscape we can reliably test; and a different modelling approach to ensure we apply known cognitive principles to our analysis and extrapolations.

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business-to-business research

Using every tool available

Going beyond surveys for B2B research

| By Troy Powell

snapshot

From journey mapping to text analytics, the author explores the many useful and complementary methods companies have to augment or replace their survey-based customer experience data-gathering.

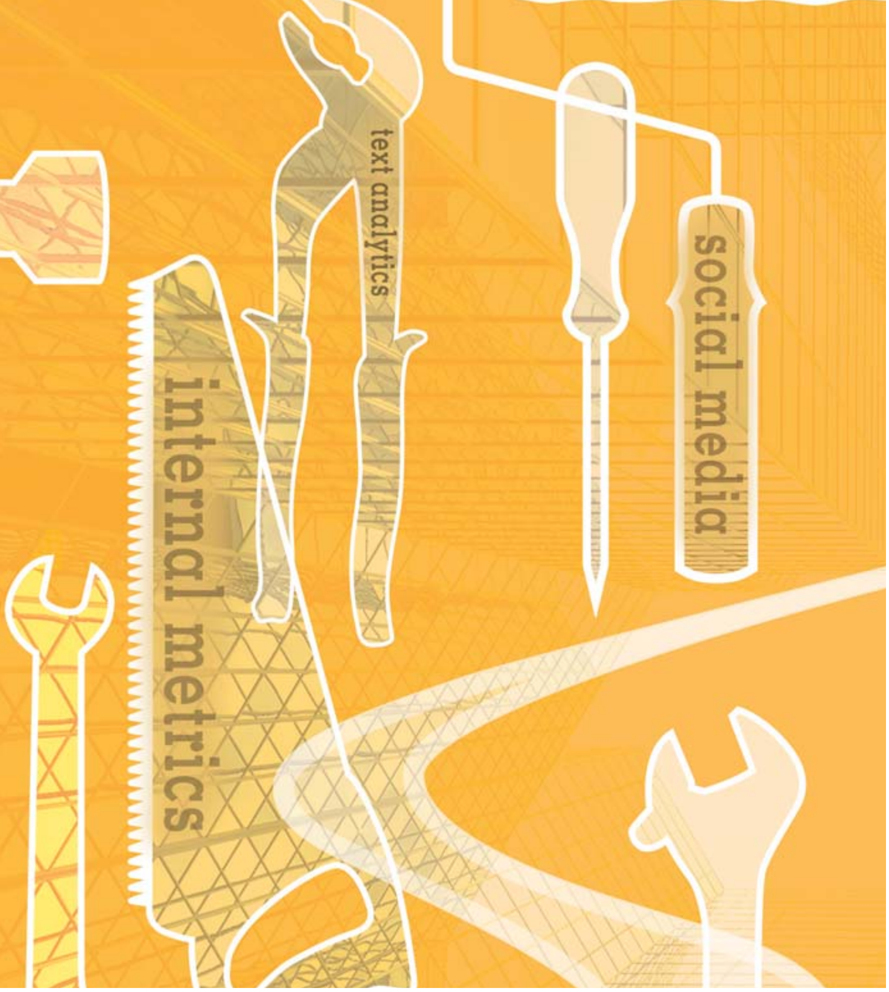
quirks.com/articles/2016/20160407.aspx

Surveys have been around for a long time. I think the idea of a survey first started the moment the social group of interest expanded beyond its leader's ability to personally talk to each member. I guess we had to wait until reading and writing were discovered for the paper-and-pencil version of the survey but the idea of having a method for gathering opinions from a large but somewhat disconnected group of people is an old concept – and a very important one.

Surveys have evolved from door-to-door (or hut-to-hut) surveys, mail surveys, phone surveys and Web surveys to mobile surveys but they have always served a valuable function to society, science and to marketing research, specifically. Surveys provided market researchers a scientific method to provide insight that is as free from bias as possible from a large group of people without having to talk to every single person. This is the core value of surveys.

However, the use of surveys has expanded far beyond their original purpose. They are often used indiscriminately to gather any kind of information with no thought about question design or sampling methods. I used to get frustrated about this fact until I decided to understand why it was happening (and, no, it's not because of the failure of scientific education in our schools – at least not totally). I believe the underlying driver of this phenomenon is an insatiable demand for customer insight.

As more and more data about customers' experiences becomes available within our companies, more people have become focused on trying to understand what is going on and where they need to focus. At any point in time, a customer support call-center manager has a dozen different metrics being tracked and monitored. If five of them are going down, which one should be focused on? Those questions are happening throughout our companies every minute of the day and, in many cases, the customer can help provide the answer.



Putting the burden on customers

At the core of survey fatigue is the fact that companies are putting the burden on customers to provide direction on the best ways to serve them. But as the technology landscape has changed, customer expectations have grown. Among the findings in Walker Information's recent Customers 2020 study, customers want a personalized experience and they expect companies to anticipate their current and future needs.

According the Customers 2020, "Companies must seize opportunities to make customer support more proactive. This can be accomplished in a multitude of ways, including implementing more efficient call routing based on a customer's past support history, tailoring customer communications and using available information to anticipate customer needs."

The ease with which surveys can be issued has caused a glut of them; surveys are everywhere and people have become less interested in sharing their opinion unless something really matters to them. Closely related, survey response rates are generally low and have been steadily declining, which means customer experience leaders are getting input from only a small portion of their customers. Also, because surveys have become so easy to develop, they have been misused by those who lack the know-how to construct one that will generate relevant insights.

We can no longer put the onus on customers to give us all the answers. Customer-focused leaders must find new ways to understand customers and optimize their experiences.

We must get smarter

Surveys will be a core tool of the customer experience research toolkit for the foreseeable future but we must get smarter about using surveys. They need to be shorter, more targeted and better designed to invite feedback that is truly relevant to your company and answer the questions that are important to you.

But the good news is that customer experience leaders do not need to rely solely on surveys. Other ways to gather insights, measure customer behaviors and monitor progress have evolved. In fact, we must to go beyond surveys and incorporate additional methods to get to provide the insight our companies need to stay competitive in today's fast-paced, information-saturated markets. Fortunately, there are many methods to embrace – some new and some that have been around for decades.

First, it's important to leverage information that already exists – your company's internal metrics. It's important to monitor behavioral data, purchase patterns, service records, quality metrics, etc., to learn how your customers interact with your company. When combined with voice of the customer (VoC) data, these internal metrics give companies a 360-degree view of the customer experience and allow companies to identify and monitor the most critical aspects of the experience for all customers at any time. This can help secure executive buy-in and support, help drive meaningful change within the organization and is instrumental in proving the ROI of optimizing customer experiences.

Customer experience professionals often focus on the difficulty of getting access to the right internal metrics, and it is often a difficult task in most companies, but I believe our problem usually lies in not having the right type of insight from our VoC data. Much of our VoC data come from surveys that ask about fairly high-level attitudes and opinions – loyalty, NPS, overall satisfaction, etc. Data from these surveys are useful for strategic tracking and for identifying broad areas of customer concern but, at the end of the day, they deal in averages. They tell us what the average customer thinks about their experiences. But the demands of customers for a more personalized customer experience requires that companies have a much deeper and more holistic view of all their customers and all of their uniqueness.

Using four different sources of insights for customer change

A global food distribution company decided it needed to differentiate itself not only on the products and the price of the products it offers but also on the experience it was delivering to its customers. It wanted to be intentional on how it designed this experience, so it created a strategy to utilize four different sources of customer insights to create a differentiated customer experience.

Step 1: Journey mapping

It brought both employees and customers together to map out how the customer actually experienced the company from their perspective. Once they mapped out the experience, customers helped the firm isolate where it was effective and where it was weak as well as what were key moments of truth that either made or broke the relationship.

Armed with the knowledge it learned from journey mapping, it was able to focus on where it needed to modify the experience in order to improve it for the customers and also get more in line with how it intended the customer to experience it from day one until renewal.

Step 2: Ethnographic research

Next, it conducted a form of ethnographic research and rode along with its delivery drivers to understand firsthand how customers were experiencing certain aspects of its delivery service. Company representatives wanted to feel it and see it the same way customers did and to more deeply understand the expectations customers had at these key moments of truth.

Step 3: Survey

After the ethnographic research it had a fairly defined set of experiences to focus on and a very specific set of expectations it uncovered. It conducted a survey to validate with a broader sample of its customer population that the feelings and perceptions expressed by the select group in the journey map and the ethnographic research were also common among those in the marketplace the firm serves.

Step 4: Online communities

Next, with all of the insights learned from the previous steps, it leveraged its online communities to monitor and understand discussions customers were having about the revised processes it implemented. It was a way to actively get perceptions from customers on whether those changes were leading to the desired outcomes it had hoped for and whether there was real, perceptible change from customers as it deployed these actions.

Use all of the tools

To meet those needs customer experience professionals must go beyond surveys as our main source of customer feedback and use all of the tools at our disposal. Below are some tools and methods to do just that, and cases of how some companies have implemented these techniques into their customer experience strategy. (See "Using four different sources…" sidebar.)

Journey mapping is a collaborative exercise documenting customer touchpoints, strengths, weaknesses and key moments of truth. A session is typically conducted by gathering a cross-functional group within your company, systematically walking them through the journey(s) customers follow as they interact with you and identifying key customer experiences to leverage as well as those that require attention. A set of customers is also interviewed to ensure there is alignment between internal and external perspectives.

Journey mapping is a great way to obtain internal and external perspectives to develop key hypotheses about where the company should focus to improve the customer experience. Journey maps also serve to align internal stakeholders around the customer and provide a rallying point for true, customer-focused culture change. However, for it to be effective it is important to implement good follow-up activities to validate findings and take necessary action.

Social media can provide insights from conversations in the customer's voice – what they want to say when they want to say it. When we refer to social media, we are talking about the more public sources where customers are talking – Facebook, Twitter, Yelp, etc. Social media monitoring is beneficial because it's authentic and real and tools such as text analytics can make it practical and useful. However, it can be misleading because the context isn't always clear and it may not be completely representative of your customer base.

By combining the structured voice-of-the-customer program with immediate feedback through social media, one company was able to understand how to better prioritize its online engagement with customers and direct resources more intelligently to improve its business performance. (See "Using social media..." sidebar.)

Online communities are company-specific spaces where customers can communicate with each other in a loosely moderated fashion. It's a great way to tap into the conversations your customers are having as they discuss their needs and challenges. It is key to moderate their discussions carefully and review and interpret them often.

Information gathered from mining community discussion can provide great detail around known customer pain points in the customers' own words. Monitoring these discussions can also alert the company when there is a sudden change in the prevalence of certain topics or issues within the community.

Online panels are a way to provide fast feedback on specific issues from engaged customers. Customers are recruited to be on a virtual panel and then asked for specific input over time. The customers who are asked and opt in are usually more engaged and can provide a great source of insights. Online panels are a quick way to cover a broad range of topics and can offer convincing input for internal stakeholders.

Customer advisory boards are topically-focused and, often, in-person customer meetings. The board is recruited and meets frequently to give their feedback and also given opportunity to co-create solutions for your company. Customer advisory boards help company management prioritize issues that matter most to customers.

Ethnographic research is a great way to see a customer in their real environment interact with a product or a problem. Observing what a customer is doing and why they are doing it can lead to unexpected discoveries. This is a popular method in user experience research but is not used as often in the CX space. However, it can be an incredibly powerful tool for understanding exactly what is causing customer pain and how to fix it.

We had a client that kept receiving complaints and poor scores around its invoicing. It wasn't until the firm sat down with a group of customers and watched them try to understand, reconcile and pay their invoices that the client began to understand the problems.

Voice of the customer through employee (VOCE) involves getting feedback from the employees who are interacting with the customers the most. VOCE leverages the knowledge of your customer-facing colleagues, such as account managers and service representatives, and is a good way to get employees engaged and involved. It's important to be aware, however, of employees who want to use this outlet as a sounding board for their own personal issues with the company.

One of the great advantages of survey data for customer experience research is the ease of analyzing and reporting it. We can turn messy customer thoughts and emotions

Using social media to combine solicited and unsolicited insights

For several years, a firm had been conducting voice-of-the-customer programs which provided a solid breakdown of the financial benefits of creating loyal customers, detailed loyalty metrics, performance metrics and drivers of loyalty.

Separately, the marketing department created a social media team with responsibilities of collecting, measuring and monitoring millions of conversations about their brand, products and services and competition from a myriad of online sources.

They began by gathering data from the three most common social media sources: the company's online community, the company's Facebook fan pages and tweets from Twitter. The social media discussions were combined with the solicited feedback from their voice-of-the-customer programs.

Once the information was captured, a structured library of comments was created and organized to align with the way the firm makes decisions and supports its customers. Next, priority was given to those comments that fell into the categories known to influence customer loyalty and customer purchase decisions. Finally, statistical analysis was performed to better understand the relationships between the solicited and unsolicited feedback.

A look at customer comments from the community, Facebook and Twitter clearly revealed that product installation was a common topic mentioned online. In fact, installation made up almost one-third of all comments. Normally, this might reveal that installation was a problem demanding immediate attention. However, when looking at the structured customer feedback, ease of installation was found to have little influence on customer loyalty and customers generally provided favorable performance ratings.

Through this, the firm identified a specific area in which it needed to proactively engage in online discussions. In addition, it identified a product development initiative that focused on enhancing customer loyalty.

By combining the structured voice-of-the-customer program with immediate feedback through social media, the company was able to understand how to better prioritize its online engagement with customers and direct resources more intelligently to improve business performance.

into neat numbers on a rating scale that can be analyzed and reported in a fairly structured and efficient manner. Many of the sources mentioned above produce unstructured data. If volume is low, it is possible to synthesize the unstructured data into findings without much help. However, when the data volume expands (like with social media data), it requires some help to find the relevant insights.

Text analytics is the use of natural language processing technology to analyze unstructured text to understand the central themes and topics that exist. Text analytics is not perfect; it is not a magical tool that will reveal all the truths in your data and it is not as easy as pushing a button. However, it is an indispensable tool for turning large volumes of unstructured data into a set of structured codes that can be used to derive meaningful insights.

In our experience, purely exploratory text analytics projects have a low chance of success. If you turn over a mass of unstructured data to your text analytics team and say, "Find me something useful," you will probably be disappointed. It is much better to come to a text analytics project with a specific hypothesis or purpose in mind and let that purpose determine both the data that is used and the design of project.

Implement a balanced, holistic approach

While it's not necessary, or even advisable, to use all of these methods for every research project, it is more important than ever to implement a more balanced and holistic approach to gathering customer intelligence. As opposed to the early days of market research, companies these days are overwhelmed with data and information about their customers. Customer insights derived solely from a survey do not have the same impact when executives can easily find out that customers with a specific product in Malaysia are showing significant declines in usage.

As customer experience researchers, we need to create an adaptable and agile system of gathering customer perspectives whenever and wherever it is needed. And then we need the ability to synthesize and merge that data with existing company metrics to help our companies adapt and optimize the customer experience wherever there is a problem. Sounds like a tall order, right? Well, it is. But I don't think there is any other choice if we want to add the value our companies need.

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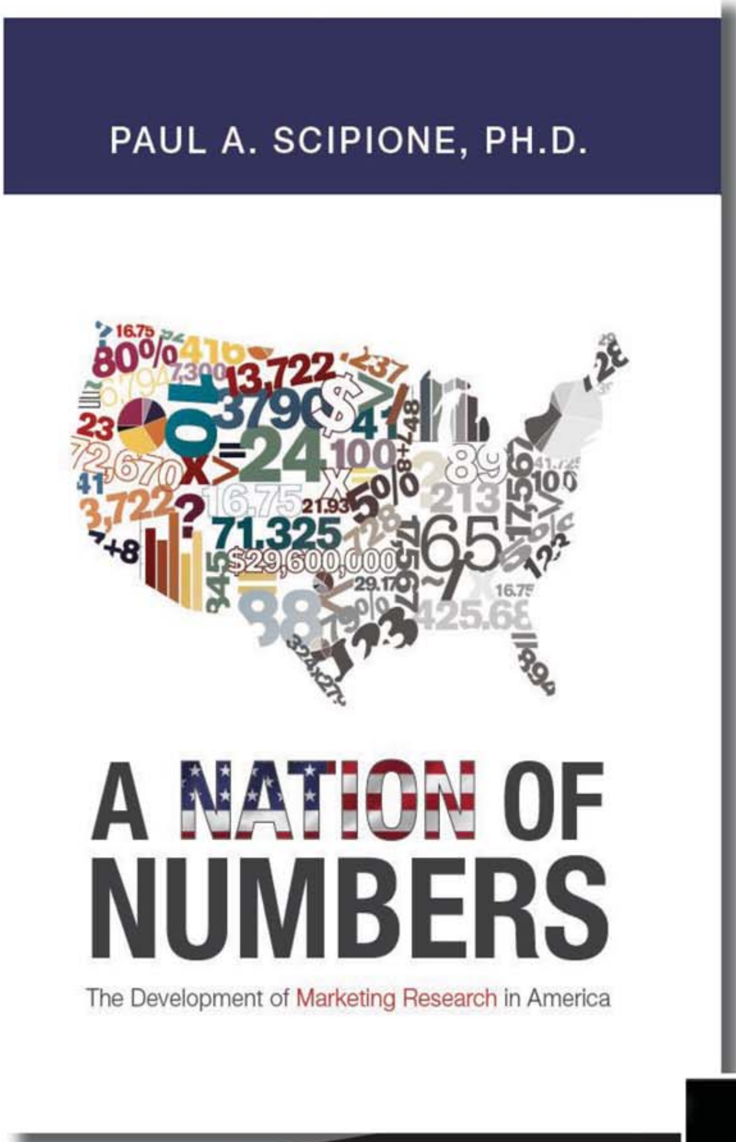

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Unlocking the mystery

How B2B research methods can help FMCG companies

| By Matthew Oster

snapshot

For FMCG companies whose products are sold to or used in institutional or B2B markets, B2B research methods can help shed light on distribution channels and user bases that were not previously well-understood.

Fast-moving consumer goods (FMCG) companies have long been avid clients of traditional B2C market research, from market-sizing and trends analysis to consumer panels and focus groups. A longstanding focus by the research community and the average retail consumer (as well as detailed scan track data) has allowed companies to comprehensively analyze the market for a particular product and surgically implement outreach and advertising campaigns to target likely customers.

This need for, and reliance upon, traditional market research by FMCG companies in the B2C space doesn't look to change in the near future but as companies are searching for other avenues for value generation, many are increasingly looking to the institutional (or B2B) marketplace as an underdeveloped opportunity for future sales expansion and resource allocation.

B2B still represents a small and not-well-understood segment for

most FMCG companies. (An obvious counterexample is paper companies, which have consistently treated B2B more centrally to their sales strategies and outreach than other types of FMCG providers.) The market for most FMCG products is wholly different from those found through retail. Many products are sold unbranded or in bulk and are less respondent to consumer trends or whims; as a result there are fewer opportunities to differentiate brands and product lines. Consequently, purchasing decisions in B2B channels are much more determined by other, more structural metrics: price; quality and functionality; flexibility and service; timeliness. Factors like advertising and promotion have limited if any pull in these channels.

In the absence of using outside market researchers, most FMCG companies have developed in-house techniques that are frequently incapable of meeting the difficulties of understanding market drivers in the B2B space: who is leading in that space, whether they may be other FMCG manufacturers, distributors, wholesalers or service providers; and whether their sales are successfully meeting the size of the opportunity in this space. Many FMCG companies are frankly even unaware that a blind spot exists in their knowledge of the B2B marketplace.

One FMCG packaged food company we recently worked with in Mexico had always performed its B2B market research in-house, which it felt was sufficient in understanding the institutional marketplace for its products. However, that changed when one of the company's insight managers was surprised to see the firm's products being served in his daughter's elementary school. He had no knowledge of its products being sold into that institution and he realized they had a serious lack of visibility of their products within institutional channels.

This limited visibility constrains individual FMCG companies' ability to effectively or efficiently measure this marketplace on their own. The most common (and most cost-effective) in-house option that these companies typically employ is a simple survey of their clients, which in this case are frequently distributors or wholesalers. However, this suffers from a number of limitations, as the preceding anecdote suggests. Distributors are only one link in the value chain for FMCG products and many times are too far removed from the final end users to be able to understand their purchasing and consumption behavior, how they have evolved over time, and, yes, even who they are in the most basic of senses.

In our experience, these constraints have forced FMCG companies to look to market researchers to shed light on the B2B landscape in a more systematic and nuanced way than the companies can realistically provide for themselves. For such analysis to be credible and comprehensive, it must marry a variety of approaches, both top-down and bottom-up, to paint the picture of how institutional channels operate, what they look like and how they are evolving, while at the same time examining individual channels' purchasing behavior, product needs and decision points.

At the most fundamental level, research on the institutional end-users within a B2B environment has to start with a broader examination of the institutions themselves before a deeper dive on purchasing and consumption trends. As a result, such research typically involves a top-down analysis of the underlying components of these institutions (how many exist; what they look like and offer their customers; how they can be segmented; how many people they serve, either in the form of employees, guests, visitors, etc.; how fast they're growing or declining, especially compared to other similar types of institutions). Research such as this relies on interviews with industry experts (trade associations and other industry groups, government statistical agencies, prominent end users) as well as official statistics, FOIA requests and demographic/macroeconomic analyses.

This structural approach is combined with bottom-up research focused on understanding the specific behavior of a particular channel. Sizing the opportunity for a particular product in the B2B marketplace comes in the form of online, in-person and telephone surveys of procurement and purchasing officers, service providers and distributors, with care to sample a range of facilities by size, type and needs (e.g., within channels like manufacturing, certain facilities require specially-formulated products for services like cleaning and sanitation). Though this methodology doesn't change markedly depending on the institutional channel, country or product in question, the sampling size might change to reflect the level of integration in the industry, the amount of respondents who can credibly add insight and the comfort of industry professionals to respond to market research inquiries.

Recognize and ameliorate chief pain points

Clients' comfort and willingness to contract out for market research on the B2B landscape is dependent upon the ability of the researcher to recognize, and ameliorate, their chief pain points. Due to the natural opacity of the markets in question and the complexity of handling this type of research alone, most clients have a number of blind spots when it comes to understanding this marketplace. I'd like to touch on a few of the most frequent challenges for any FMCG company that tailored market research can address.

Understanding and maximizing the value chain. (How effective are you at getting your products to market?)

Returning to the anecdote above, many FMCG companies have expressed basic confusion on not just the size of the prize within institutional channels but also how their products are getting to market. This lack of vision severely limits their ability to effectively evaluate and manage the value chain for their products.

This knowledge gap takes many forms and can lead to inefficiency, redundancy and incomplete coverage of a company's product portfolio across institutional channels. More important, it costs money, as cost efficiencies routinely enacted in B2C markets cannot be leveraged when companies don't know enough to incorporate them in a B2B setting.

This deficiency is more acute the more complex a product's value chain is. How many hands are touching the product before final delivery? Which link in the value chain has the most power? Who ultimately determines where these products should go? Without a systematic approach to understanding the links in this ecosystem and how they interact, many companies are at a loss on how to take advantage of it.

To resolve these issues, companies typically request a variety of market research services such as distributor profiling, route-to-market mapping and vendor matchmaking. Successful programs should dissect existing routes, identify best-in-class partners and reconfigure networks to expand and strengthen the company's customer base.

Shedding light on purchasing. (Are you missing key sales opportunities?)

Speaking of customer base, many FMCG companies are similarly at a loss in assessing the final customers of their products, a deficiency that cannot be fixed through simple surveying of their distributors. With a clearer understanding of who is purchasing these products and why, FMCG companies could develop strategies to expand or consolidate their market share and shift into underdeveloped channels.

To do so, FMCG companies require detailed analysis on how their final customers are using their products or services, how quickly products are replaced, refilled or reordered, who makes purchasing decisions for each customer, how they choose vendors and how often these relationships change. It helps to understand which end-users use a formal tendering process, whether they instead rely on their distributors for the types of products they purchase or even if they use wholesalers or cash-and-carry outlets for the bulk of their product needs.

To effectively segment potential and recurring customers, a suite of solutions like lead-generation and market opportunity analyses help identify where opportunities lie. Through this, companies can examine the characteristics of certain customers and make decisions based on these metrics: Who is going to their customers' facilities (employees, guests, patients, students)? Are they public or private? What industry do they reside in? How complex are their supply needs? These are all critically important in understanding the size of the prize.

Sizing international opportunities. (Where else can you go to sustain strong sales growth?)

In other cases, FMCG companies have a good enough understanding of where and how their products are being sold and have identified limited options for broad future growth in that country's B2B markets. Even with these types of knowledgeable clients, their vision only extends so far and they might be missing golden opportunities abroad, especially in markets with less-developed B2B networks and less self-evident institutional customers.

Strong and long-term growth potential

The opacity of foreign B2B markets can be opened up to enterprising companies through the various solutions highlighted above. Inevitably, the B2B market for FMCG products will migrate with greater frequency to foreign markets, especially developing economies like China and India, that offer strong and long-term growth potential and limited competition for products and services.

Effective diagnosis and treatment of a client's pain points are instrumental in validating the need for external market research assistance in the B2B space. Though FMCG companies are increasingly amenable to these types of services, it still remains a challenge to get clients over their preconceived notions and to look critically at their own processes and systems. However, it is well worth the effort given the large potential opportunity to be found in this space.

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business-to-business research

A better use of your time

How companies are getting it wrong with their customer experience measurement programs

| By Doug Berdie

snapshot

Using examples from a construction materials distributor, Doug Berdie looks at the perils of placing undue emphasis on satisfaction scores and the benefits of instead emphasizing the actions taken to improve satisfaction scores.

Measuring customer satisfaction has been an organizational imperative since the 1980s. Since that time, the acceptance of a false assertion by management executives and research practitioners has limited the value of surveying customers. The false assertion is: If customer satisfaction scores increase, then revenue and profits will necessarily increase.

The reason this assertion is false is because it talks about scores not actual business activity. Strict adherence to this false assertion has blinded many from seeing, and focusing on, two true assertions:

If activities that better meet customer needs are implemented, then a positive impact on revenue and profits will usually result.

If customer needs are better met, then customer satisfaction scores will usually increase.

Let's examine the consequences that flow from accepting the false assertion and not focusing on the two true assertions.

Truth: Increased customer satisfaction scores do not necessarily result in increased business financial results

Like many myths, the false assertion has been repeated so often most people unquestioningly accept it as fact. The purported chain of events that underlies the assertion (from satisfaction scores ⇨ repurchase ⇨ loyalty ⇨ positive financial results) seemed to make sense – despite a lack of data to support it. Now we are able to examine the extent to which satisfaction scores do predict financial results. And the truth is that customer satisfaction scores do not reliably predict bottom-line financial results. They are nothing more than scores and many things influence scores that are not related to the actual experience customers receive.

A solid business-to-business example comes from Brock White Company LLC, a North American construction products/materials distributor, which recently made available 20 years of customer satisfaction data coupled with the most recent 12 years of revenue data.

quirks.com/articles/2016/20160409.aspx

Table 1

	Corr. of "Overall Satisfaction"		Corr. of "TOTSAT"		TOTALS
Correlations	w/Rev.	w/Rev. Change	w/Rev.	w/Rev. Change	
-.4 +	0%	1%	0%	1%	0%
-.3 to -.399	5%	2%	6%	6%	5%
-.2 to -.299	9%	13%	15%	11%	12%
-.1 to -.199	21%	9%	14%	15%	15%
-.001 to -.099	21%	25%	15%	19%	20%
.001 to .099	16%	20%	19%	17%	18%
.1 to .199	12%	16%	19%	15%	15%
.2 to .299	10%	8%	9%	8%	9%
.3 to .399	4%	4%	2%	7%	4%
.4+	2%	2%	1%	1%	2%
# of Analyses	129	128	129	129	515

The detailed analyses allowed for company-wide, branch-level and individual customer examinations.

These analyses revealed:

- At a corporate level, 20 correlations looking for satisfaction scores as a leading, concurrent or lagging indicator of revenue yielded correlations ranging from -.065 to .067 (with 11 of the correlations negative) – so close to zero that little doubt can exist as to the lack of association.
- At a branch level, the more than 500 correlations, taken as a whole, show no relationship between satisfaction scores and revenue or year-to-year revenue change.
- At an individual customer level, the revenue generated by customers who were surveyed over the measurement history does not correlate with their customer satisfaction scores.

In fact, of the hundreds of analyses conducted, about half produced negative correlations – astonishing, given the "common sense" belief that satisfaction scores would lead to positive correlations with revenue.

Table 1 shows the results of the 515 correlations conducted to see if branch-level satisfaction scores correlate with branch-level revenue or branch-level year-to-year revenue changes. The right column (summarizing all correlations) approximates a normal curve, which is what one would expect in a sampling distribution where no correlation between satisfaction scores and revenue exists. The second through fifth columns show that, no matter how data were examined, the results also approximate a normal curve distribution.

These low correlations were not solely the effect of how an "overall customer satisfaction" measure was worded or calculated – or the number of scale points used or other technical issues. In addition to looking at data generated from a single, "overall satisfaction" question, the analyses took into account a "TOTSAT" number derived for each individual customer that indicated whether that customer was satisfied with the aspects of the experience deemed most important to that customer. On its face, this TOTSAT should produce a more robust measure of overall satisfaction than a single question and, in fact, one reason this analysis was conducted was to prove that it does. But it does not. The TOTSAT scores are as poor a predictor of revenue as are the scores from the single "overall satisfaction" question.

If this were the only study that disproved the supposed predictive relationship between satisfaction scores and revenue, that would be one thing. But in a May 2015 Quirk's e-newsletter article ("Why conventional customer surveys create a false sense of security"), David Trice indicates, "Most C-suites haven't seen a correlation between the data from these [customer metrics] and financial lift," and a review of marketing and research literature shows this lack of a link to be the rule rather than the exception.

Extensive purchase criteria and win-loss research conducted over many years shows that customer satisfaction is only one of many factors influencing actual purchase decisions – with others including factors such as 1) product/service availability, 2) how well the product/service is deemed to meet the immediate need, 3) other options, 4) price, 5) how well the product/service can be supported by the vendor and the prospective client's organization, etc. In addition, more cyclical industries have such severe downturns and upswings that either no one is buying or everyone is – regardless of satisfaction levels. Previous experience (i.e., "customer satisfaction") with the vendor is only one of many factors. So, would one really expect to make the sale in a situation where customer satisfaction is high but the product the customer needs at a given time is not deemed to meet needs as well as a competitive product that can be delivered more quickly at a lower price?

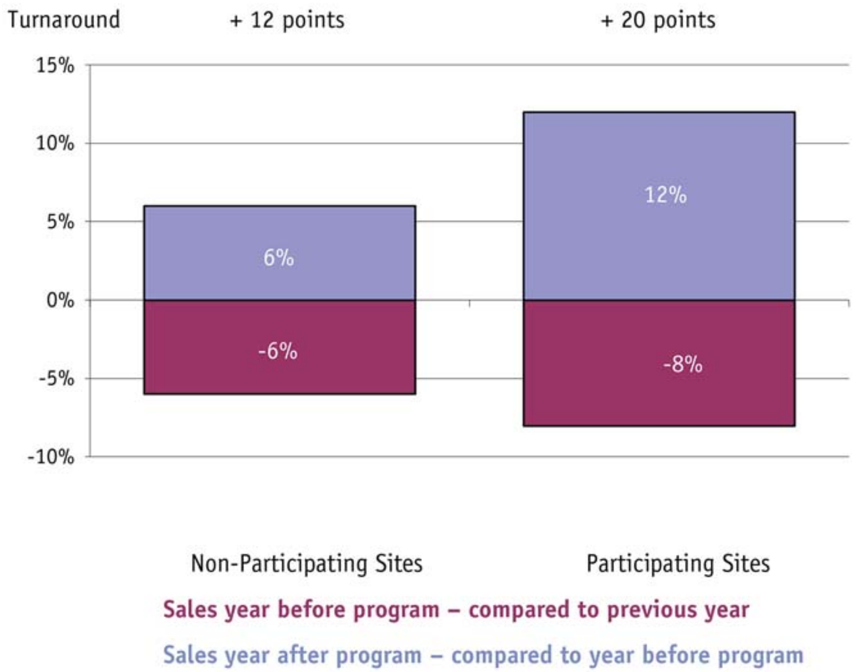
Negative consequences of failing to acknowledge the truth

The key negative consequence of ignoring the truth is that organizations stress improving scores – at the expense of improving products and services. This is an example of organizations reinforcing the wrong thing and not, therefore, obtaining the desired effects. Companies that continue to believe customer satisfaction scores predict key financial measures put these scores on their balanced scorecards. And, because they want the scores to increase, they charge their organization to "make the scores go up." Management, then, compensates employees based on raising the scores.

Basic psychology has, or should have, taught us that when one's compensation is tied to a score, one's focus is on how to influence that score favorably – by any means possible – and many ways that affect a score have nothing to do with improving the customer experience.

Hence, the history of customer experience measurement is rife with creative ways employees and channel partners affect customer satisfaction scores. A small sampling includes: cajoling customers into giving high scores (either by providing extras or badgering customers to give high scores by explaining the importance to the employee or channel partner of getting a high score); employees and

Figure 1: Program XYZ Effect on Sales



channel partners intercepting survey invitations and completing the surveys themselves; deleting from sample lists customers it is believed would give low ratings; doing "pre-surveys" of customers and deleting from the sample list those who feel negatively; and countless other creative ways to raise scores. Some employees go so far as to encourage friends and relatives to complete surveys so the scores can be artificially inflated.

Related to the above negative consequence is the costly cottage industry that has arisen designed to identify "cheating" and remediate its effects. Such tactics (all of which take time, focus and resources away from actually improving products and services) include: contacting customers to verify they actually completed a survey; implementing complex analytical algorithms to eliminate surveys where response patterns seem "suspicious;" assessing how long it took to complete the survey in cases where it was done online (on the assumption that people who did not take sufficiently long must not have given well-considered responses); reviewing IP addresses to check for company-owned computers that may have been used to complete the survey; and many other such activities. And, because compensation is tied to scores, entire subterranean cultures have sprung up within some companies to ensure high scores. Employees review each survey result and find reason to contest negative ratings so they can be discarded on the basis of the customer being "confused" when completing the survey or having not spent enough time considering the question to give a "thoughtful" response. Much time is wasted dealing with appeals from employees and channel partners who contest the ratings they received – leaving less time to deal with actual product and service issues the ratings may have revealed.

A second major negative consequence of ignoring the truth is that many organizations have limited the number of questions on their customer satisfaction surveys. An extreme example of this is asking only one question (an "overall satisfaction" question or some type of "recommend" question). These short, one-question surveys are used based on the mistaken belief that resulting data predict financial outcomes. The move toward shortened surveys meant the details needed to actually identify where focus should be directed to drive quality improvement was lost. So, because satisfaction scores, in fact, do not predict financial outcomes, these "short surveys" provide virtually no value at all.

Positive consequences of acknowledging the truth

A primary positive consequence of acknowledging the truth is the freedom to stop compensating employees and channel partners on scores and cut out the waste in resources that tags along with that useless activity. Removing the customer satisfaction number (in whatever guise it takes) from the balanced scorecard will communicate to employees and channel partners that instead of compensating based on scores, compensation will be tied to actions that benefit the organization and make it easier for customers to buy. Let's look at how this works.

Years ago, a client decided to compensate employees and channel partners based on a set of actions the client believed would elevate the quality of the customer experience. These actions included: 1) participating in a site-specific customer survey to identify site strengths and areas for improvement; 2) site managers reviewing the survey results with a territory manager; 3) providing sites with a best practices toolkit for managers so they could see what had previously worked well at other sites to solve similar problems; 4) managers developing a site-specific action plan to address concerns customers had expressed (as well as building upon strengths customers noted); 5) having the action plan reviewed and approved by their territory manager and their regional manager; 6) implementing the action plan; and 7) demonstrating to the territory manager the action plan had been implemented. The territory manager was compensated on the number of retail sites that completed the seven steps.

The above process contained no element to reward scores as it was based on the assumption that all a site manager can do to improve business results is to implement actions that make sense to all those in the organization – based on customer-identified issues to be addressed. The motivation for influencing scores disappeared and the focus was directed toward defining, implementing and completing actions.

Demonstrating that actions were taken was relatively easy. One site that had been criticized for a lack of parking produced a signed agreement from a neighboring business indicating space had been leased from the neighbor so the client's employees could park there

– opening up more on-site spaces for customers. Another site had been criticized for having a congested driveway, making it difficult to enter and leave the site, which resulted in customers eyeing the congestion level before deciding whether to enter at all. Follow-up discussions with a few customers, coupled with an on-site walk-through by the site manager and the territory manager, revealed POS placards and other physical obstructions that could be relocated to ease traffic flow. Before-and-after photographs demonstrated that these changes improved traffic layout and the number of vehicles in the driveway.

The chart in Figure 1 shows stunning results from the above-mentioned project. It shows the difference in year-to-year sales (before and after the program's activities) between those sites that participated fully in the program and those that did not. Participating sites showed a 20-point sales turnaround gain compared to a 12-point gain for nonparticipating sites. Given the controls used, and the fact that many thousands of sites were involved in the analysis, one can conclude that much, if not all, of the eight-point difference is attributable to the actual design and implementation of the plans required to reap the compensation benefit.

Two unanticipated positive outcomes resulted from this practice of rewarding completed customer service improvement plans. First, employee turnover rates at the participating sites actually decreased by three points while increasing by five points for nonparticipants – an overall difference of eight points. And, second, participating sites experienced a 22 percent gain in customer satisfaction mean scores on the following year's survey – compared to a 1 percent decline among nonparticipants. As there was no compensation tied to scores, there is little reason to believe participating sites used devious tactics to obtain higher scores. Rather, the positive actions that were implemented drove these higher satisfaction levels.

The successful practice described above is similar to the management by objectives practice that organizations have used in varying degrees over the years. Rewarding actual behavior is key – not scores. It is odd that so few organizations are willing to move in this direction with regard to customer experience measurement.

Another interesting positive consequence of not compensating people based on satisfaction scores is that one can now actually instruct employees and channel partners to ask customers at the end of a transaction if there is anything else that can be done to maximize their satisfaction. Asking such a question is no longer seen as an attempt to influence a score but, rather, as a sincere, immediate, positive effort on the employee's part to be certain everything is okay.

Return to the more reasonable approach

Since the advent of customer satisfaction surveys, the most common criticism has been that they do not obtain enough detailed information to drive action because the specific actions needed are not clear from the survey results. Once the one-question approach is abandoned, organizations are free to return to the more reasonable approach where an overall satisfaction question of some type is asked as well as asking about broad, general categories of the customer experience. Things such as: purchase process; ordering and delivery processes; product/service performance; invoicing; and post-purchase customer service.

The survey should also ask more detailed satisfaction ratings about the elements within the broad experiences listed above. So, for example, there may be questions that attain satisfaction ratings about various aspects of the purchase process such as:

- how well the sales representative understood the customer's needs;
- how knowledgeable the sales representative was about options to meet those needs;
- the pricing options available and the clarity of explaining them; and
- the speed of response to questions the potential customer may have had.

The overall logic of this survey type starts at a very high level (e.g., "overall satisfaction") and works its way down to a somewhat more specific level (satisfaction with categories of the customer's experience), moving to a yet more specific level (inquiring about elements within those categories of experience). Rarely do customer satisfaction surveys obtain more detail than this, though some attempt to do so with limited open-ended questioning.

The companies that derive the most benefit from customer satisfaction surveys gain this additional benefit by using the survey results to drive follow-up interaction with their customers to identify:

- exactly what the survey data mean;
- the impacts on customers of uncov-

ered issues;

- customer suggestions for improvements;
- knowledge-sharing as to what industry competitors have done to address expressed concerns; and
- changes coming to customer environments that will influence these issues and ways to get ahead of those changes.

Brock White capitalizes on its customer satisfaction feedback in just this way. Over 20 years ago, Brock White formed its Contractors Advisory Council (CAC), consisting of about 15 contractor customers who meet each year for a four-hour session to discuss survey feedback and other related issues. Contractors are invited to participate for two years on an overlapping basis and new contractors are added as two-year terms expire. This practice ensures new and varying types of input. The fact that customers arrive for various parts of a two-to-three-day period presents a relaxed and open environment and leads to opportunities to discuss the business relationship outside of the formal four-hour session.

At the four-hour session, Brock White shares its customer satisfaction results and contractors break into small groups to discuss those results. They present the results of their discussion to the reassembled entire CAC for further discussion. The results are impressive in terms of depth of knowledge obtained and clear direction as to what Brock White must do to maximize how well it meets its customers' needs. Two examples will illustrate this.

One customer survey showed lower than desired scores with the general "ordering and delivery" category and the somewhat more specific elements of that category: "the amount of time it takes to receive orders [delivered by truck]" and "the extent to which deliveries contain the products and materials you ordered."

The CAC discussion revealed that the reason some contractors were disappointed had nothing to do with lead times or missing delivery dates but with the fact that some deliveries were made to the wrong area within a job site, so that those who were awaiting them did not know the delivery had been made. The consequence to contractors was a work slowdown that added expense to their job. They suggested more clarity in the communication between themselves and Brock White to resolve this issue and indicated exactly how to make those clarifications to ensure truck drivers know precisely where on the job site deliveries are to be made and how to notify them when those deliveries have been made.

There would have been no way to get to the successful resolution of that problem from only the survey results. Similarly, the discussion about why the ratings of "the extent to which deliveries contain the products and materials you ordered" were suboptimal revealed that 1) in some cases customers had not understood that a portion of the original order had been backordered and would arrive later; and 2) paperwork that accompanied deliveries was not always formatted in a way that made it easy to compare to the original order forms and invoices. CAC members pointed out the exact areas of confusion and steps for how to clarify in the future – along with the insightful feedback to Brock White that when reconciliation was difficult, invoice payment was delayed. Armed with this knowledge, Brock White was easily able to see how to resolve this issue and did so quickly – to everyone's satisfaction.

Thus, collecting customer satisfaction feedback allows organizations to drive directed follow-up discussions so the exact nature of existing issues is revealed along with specific, customer-endorsed solutions for addressing them. There simply is no way a survey itself can go to that level of detail given the need to cover a wide array of topics within a time frame acceptable to survey respondents.

Free to abandon counterproductive practices

Once organizations realize that customer satisfaction scores do not predict financial outcomes, they are free to abandon certain counterproductive practices tied to that belief. And, by acknowledging the truth of the other two assertions above related to customer experience, they are able to take several immediate steps that are most likely to positively affect business results. They can: remove from the balanced scorecard single numbers obtained via customer surveys; stop compensating employees on customer survey scores; ask enough questions (at varying levels of detail) in customer surveys to provide a basis for digging deeper in follow-up meetings with customers; establish customer advisory councils, or maximize the utility of existing ones, to review survey results and help pinpoint important improvements; and, once the issues and opportunities have been clarified by these follow-up discussions, implement a program whereby employees and channel partners are rewarded for designing and implementing approved quality improvement programs.

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emerging markets research

Know what you're getting into

The challenges of conducting effective pharmaceutical market research in emerging markets

| By Marc Yates

snapshot

Marc Yates offers a three-step guide to undertaking health care or pharma marketing research in non-Western markets.

Emerging markets present an exciting opportunity for growth for the pharmaceutical industry, as traditional Western markets mature and there are a limited number of new products in the pipeline offering blockbuster revenues.

Some of the emerging markets, such as the BRIC nations of Brazil, Russia, India and China, are experiencing double-digit growth, as well as burgeoning public and private health care systems. A demographic of wealthy urban patients who can afford better-quality health care is on the rise, with an appetite for Western lifestyles and products.

To successfully launch in these markets, however, pharma manufacturers need an in-depth understanding of the environment in which they are planning to operate and this can be tricky as many lack reliable data intelligence. Custom market research can plug the gaps in knowledge and help marketers make more effective strategic decisions.

But even carrying out research in these lesser-known markets can be challenging, requiring a strong understanding of the local health care environment and an awareness of cultural and behavioral nuances. Getting the help of local experts is key but they might be in short supply in a less-evolved market research industry.

Based on our experience in managing research projects involving emerging markets, here is a three-step guide to conducting effective market research in these territories.

Step 1: Understand the environment

Understanding the environment is critical to ensure the project scope is defined in the best way to achieve the project objectives. This will help you determine the following regarding your research design:

Which emerging market(s) to select. In some cases, there might not be sufficient budget to conduct market research in all markets of interest – effective research starts with careful choice of markets, based on an understanding of the environment. If appropriate, country archetypes

quirks.com/articles/2016/20160410.aspx

Are proxy markets appropriate?

With pharmaceutical market research being subjected to ever-tighter budgets and timelines, marketers and managers alike are increasingly tasked with deciding which markets will be most relevant to their business and yield the greatest return on investment. As conducting market research in all markets of interest is rarely a viable option, country archetypes (i.e., countries which are similar to one another) are a hot topic.

Specifically, you might want to identify markets within a region to conduct research in and use as a proxy to understand other markets. How well this works depends on the extent to which markets can act as effective proxies for one another in order to meet the project objectives:

- If you need to explore emotional aspects of patient attitudes and behavior, it is probably reasonable to use proxies as long as the markets have similar lifestyles and consumption habits.
- For branding and communication testing, reactions from health care professionals across the region may be similar although there is a need to consider language (in terms of messaging).
- For projects where you are looking to increase market understanding or evaluating more tactical aspects of a launch, we would advise against proxies due to the diversity of health care systems within each region.

Assuming it is reasonable to use proxy markets based on the project objectives, how should you go about selecting which market to use as a proxy?

- We typically consider emerging markets in tiers based on size. The number of middle classes within a market is closely linked to pharma market size and opportunity.
- Within each tier of markets, there are a number of secondary considerations, including: timing and cost-effectiveness; size of market; internal strategic importance of market; client infrastructure within market; language and culture; and political stability.

can be used as a proxy to understand other markets of interest. (See sidebar.)

Which cities to research. Within each emerging market, the environment is often heterogeneous and there are vast disparities between cities and regions. This is especially the case when considering the self-pay market within health care (those who have to cover the cost of their own treatment with insurance or their own funds). The opportunity in top-tier cities may differ considerably from that in smaller cities and rural areas – meaning that defining the cities to cover within the research is critical.

Which stakeholders to interview. Effective market research necessitates asking the right questions of the right people. The "right people" in emerging markets often vary from traditional markets because the patient journey in emerging markets is less clear-cut. For example, in self-pay situations, there is an increased need to understand the patient, because they have to demonstrate a willingness to pay for treatment.

Consider whether physicians should be practicing in the public or private sector (or both), depending on which sector has greatest ultimate opportunity for the drug.

Some emerging markets have a blurred distinction between ethical drugs and over-the-counter drugs, meaning that prescription-only medications might be purchased without prescriptions, despite government efforts to regulate such practices. In countries such as India or the Philippines, patients can often obtain medication directly from the pharmacist that would require a prescription in other markets. Hence, pharmacists may carry increased weight in the sale of a particular drug and therefore be relevant targets to interview.

Building in a definition phase to define the project scope is highly recommended to address some of the challenges regarding conducting research in these countries. It will also help you agree on any questions regarding market, city and stakeholder selection.

- A starting point for understanding is often through interviews with internal stakeholders, including local affiliates/teams, who often have on-the-ground knowledge of the relevant health care issues within their market. Involving these stakeholders at the start of a project can often help to facilitate buy-in to the research.
- There is no point reinventing the wheel – why ask a question if you already know the answer? Reviewing all relevant research gives you a thorough insight audit, from which you can elevate your understanding rather than start from scratch.
- However, in markets where little research has been conducted, it might be worth conducting a phase of secondary research or including a small number of opinion leader/expert interviews prior to the main fieldwork phase.

The elements which need to be included in the definition phase will vary based on a number of considerations,

Figure 1

Overview of Research Methodologies – Physician Research in Emerging Markets

starting with the client objectives. However, at least some of these elements will be relevant for almost every emerging-market project.

Step 2: Select the best method

To determine which research methodologies are possible and appropriate in emerging markets, two questions need answering: Which methodologies are culturally permissible? Which methods are technologically possible?

Using the MENA region (Middle East and North Africa) as an example, physicians are usually not comfortable interacting without direct human contact. Physicians have a high social status and it is deemed respectful to meet physicians face-to-face. Interestingly this used to be the case in China and South Korea as well but in recent years physicians have become more open to online questionnaires. This demonstrates how cultural norms can shift fairly rapidly in emerging markets.

Technology is also a crucial factor. A lot of emerging markets have bypassed traditional telephone lines and moved straight onto the Internet. However, this does not mean all physicians or patients have reliable Internet connectivity or computer access at the home or workplace. For example, it is common for physicians in Vietnam to share computers, making online research impractical.

While it is common for physicians to have 3G or 4G smartphones, in Latin America data is expensive and the connectivity is also unreliable, meaning mobile-based surveys are not effective and you need to rely on face-to-face or telephone interviews. Mobile telephone calls can also be expensive in some markets such as Brazil, meaning telephone interviews may actually be no more cost-effective than face-to-face.

Which methodologies work where? Figure 1 provides an overview of the methodologies – qualitative; telephone; mobile; online – that are commonly used to conduct interviews with physicians and those which are used less frequently (where greater checks and balances are required). While some of the newer methods using mobile phones for data collection are feasible, they are not yet to be recommended for use in emerging markets for health care, as physicians are still not comfortable with these methods. Having said that, this may become a standard research approach in the future.

Do projective techniques work in emerging markets? The essence of qualitative research, wherever it is in the world, is relating to people so there is no reason why projective techniques shouldn't work. They should, however, be approached with caution. Here are some tips for researchers considering their use:

- Use a skilled moderator and brief them clearly on the objectives of the technique so that it isn't taken out of context. Respondents in some cultures may need more warming up in order to be able to think in more abstract ways.
- Make sure the technique is culturally relevant, relatable and appropriate. For example, the parties described in the "brand party" technique are not common in Asia and the "brand obituary" technique is considered totally offensive in some markets!
- Take care with interpretation – the researcher must understand the cultural context of certain associations and be able to interpret responses considerately.

Are focus groups possible in emerging markets? Feasibility for conducting focus groups is market specific and varies by respondent type. In most markets, patient focus groups are possible, although disease taboos differ by market and some therapy areas might be considered too private for patients to open up about in group discussion.

For physicians, feasibility depends on availability plus seniority. In a lot of emerging markets, physicians have high workloads and also spend a lot of time commuting so it can be impractical to schedule focus groups. This does differ by market but as a rule of thumb, the more senior or specialist the physician, the less feasible groups are. Physician focus groups can be conducted in most markets, though may require additional recruitment resources, more time and smaller mini-groups/triads/dyads. It's also worth bearing in mind the impact of hierarchy on behavior. For example, if there is a mix of senior and junior doctors, the junior will follow exactly the thinking of senior physicians. Having respondents in the same peer group is critical.

Step 3: Build in stringent quality checks and balances

To achieve high-quality research in emerging markets, additional quality control steps, which are not always necessary in developed markets, are recommended. For example:

- Moderators must be highly experienced in interviewing health care professionals and must demonstrate therapeutic expertise. It is advisable to keep the number of moderators per market to a minimum.
- When there are numerous materials to test, extended briefings should be undertaken using Web cams and even dummy interviews if necessary to ensure understanding. Briefings should be conducted in the local language, especially if spoken English is not strong.
- During the fieldwork period, allow time to review the interview transcripts for quality-control reasons and to re-brief the moderator if necessary. This process allows for learnings/hypotheses to be generated for exploration in subsequent interviews.
- Because emerging markets are often new for the commissioning client, additional questions may be generated after the research has been completed. Provide an option to follow up with the research respondents to explore anything that has not been fully addressed in the initial interviews.

Prepare to be flexible

Following these three steps should provide a framework for conducting effective pharmaceutical research in emerging markets. Ultimately, when conducting research in these regions, one must prepare to be flexible, especially when the project objectives are complicated, because useful insights often follow a considered, iterative approach.

Marc Yates is director of emerging markets at the Research Partnership, a London research firm. He can be reached at marcy@researchpartnership.com.

••• a Quirk's resource guide

20 TOP Taste Test Companies

When it comes to conducting market research, there are various methods that you can use to gain insights into a product. But when you are focusing in on food, beverage and other consumable goods, the best way to know if consumers will like a product is to have them taste it! Properly-conducted taste tests are an effective way to gather important data on new products or to measure consumers' opinions on line extensions. Taste-testing can also help assess changes or improvements in a product and function as a way for consumers to rank your products against your competitors, providing essential information about the preferences of your target audience. Top-ranked taste-testing research firms will have the ability to find and recruit your target audience; provide access to test kitchens and other facilities essential for conducting sensory research and have the knowledge base to help you understand what it takes to conduct thorough and accurate tests to gather the most in-depth and effective data on products. Here is a list of firms offering taste-testing and sensory research capabilities.

quirks.com/articles/2016/20160433.aspx

AOC MARKETING RESEARCH™

AOC Marketing Research

Founded 1980 | 25 employees
Cathleen Christopher, CEO

AOC's specialty is large-quota taste tests and other in-person research in our Charlotte, N.C., facility. Our test kitchen is fully-equipped with

12 dedicated circuits, ample product prep tables, multiple large and small appliances, cookware and utensils. Our testing room features hardwood floors and seating for 32 with laptops and dividers. Each of our testing rooms has wireless amplifiers and our backup Internet is set to kick in within seconds in case the primary goes down. At AOC, we have an experienced staff and the tools your need to make your next taste test project a success!

Phone 704-341-0232
www.aocresearch.com

AREA WIDE MARKET RESEARCH

Area Wide Market Research Inc.

Founded 1988
Ann Weinstein, CEO

Area Wide's seasoned staff pours three decades of experience into every project. Our professional in-house recruiting team – the most skilled in Maryland, D.C. and Virginia – can fill any group, from an intimate few to many hundreds. Recruiting low-incidence? That's when we do our most creative sourcing! For central location tests, we staff and manage the entire process seamlessly. On-site, enjoy classroom-style or individual booth configurations, ample free parking directly outside our door to ensure on-time starts and a stocked kitchen with two fridges, two freezers, four microwaves, four ovens and its own viewing room. Plus, our building is privately-owned. No product, from cigarettes to alcohol, is off-limits!

Phone 301-590-1160
www.areawidemarketresearch.com

Market C&C Research

C&C Market Research

Founded 1992 | 700 employees
Thomas Morrison, Project Director

C&C Market Research is the complete answer to all of your data collection needs. For over 25 years our data collection specialists and field locations, coupled with our proprietary programming and data transmission capabilities, have ensured countless successful projects for all our clients. We are the largest privately-owned and -operated data collection company in the U.S. and have remained a leader in today's marketplace through hard work, ingenuity and a dedication to quality. During this time, we have worked on numerous taste test projects in each of our facilities. From projects with light prep to projects with full kitchen prep, including ovens and ranges, we have experience across the board.

Phone 479-785-5637
www.ccmarketresearch.com

Chudnoff Associates

Founded 1989 | 10 employees
Mark Chudnoff, CEO

Chudnoff Associates Inc. is an established company that has been providing custom marketing research solutions since it was founded in 1989. We specialize in food and food service marketing research and are known as the "creative problem solvers." Recognized for our award-winning partnership that demonstrates a strategic point of difference in the areas of quality, service, innovation and value. Our signature Fast Track Sensory Optimization Program (from test to in-market in weeks) offers a national sample that utilizes an iterative qualitative/quantitative process in order to develop the best possible products.

Phone 732-863-1100
www.chudnoff.com

Compass Marketing Research

Founded 1981 | 30 employees
Scott Taylor, CEO

The Culinary Research Center at Compass Marketing Research is a state-of-the art, chef-designed commercial test kitchen facility located in Atlanta. We understand the unique requirements and complexity of food and beverage research. Our seasoned staff includes project directors, sous chefs, food scientists and other culinary/project support. We offer flexible spaces that support simple to complex platforms. All equipment is quick disconnect/roll away to be configured as needed. Plentiful fridge/freezer space for product storage. Laptops for online data collection and real-time data and quota management.

Phone 800-627-7667
www.compassmarketingresearch.com

Focus World International Inc.

Founded 1980 | 48 employees
Gary Eichenholtz, CEO/CFO

Focus World International (FWI) celebrates 36 years in market research. Only FWI can provide a purpose-built, custom designed sensory testing facility complete with 16 E-Sense chambers to meet the tight deadlines and complex randomizations of sensory research studies! Forget about classroom-style seating or vanilla-box partitions! With our guaranteed data validity and our paid-to-pay-attention approach to project management and our ability to maintain control of all

possible variables within the evaluation environment (lighting, humidity, facial reaction, crosstalk-contamination, etc.) that could adversely affect the integrity of data, our clients are able to make actionable decisions with confidence.

Phone 732-946-0100
www.focusworldinternational.com

Food Perspectives Inc.

Food Perspectives Inc.

Founded 1990 | 74 employees
Nancy Eicher, President and CEO

Food Perspectives is driven to help our clients develop products consumers love. We offer expert research design consultation across all phases of the development lifecycle, from idea discovery, defining critical design elements, optimizing the formulation and validating launch readiness. FPI represents the disciplines of sensory science and consumer insights, equipping us to be an expert extension of your business team. Our MN headquarters features two state-of-the-art commercial kitchens, a large flexible CLT room and two focus group rooms. The research activities you conduct in our space are limited only by your imagination. FPI's clients include CPG, alcohol and restaurant companies.

Phone 763-553-7787
www.foodperspectives.com

Herron Associates, Inc.
Opinion and Marketing Research

Herron Associates Inc.

Founded 1958 | 45 employees
Sue McAdams, CEO

Leading food clients choose Herron for our large state-of-the-art culinary space, hard-working staff and seamless deliverables. We partnered with leading culinary teams to bring you a kitchen designed by experts for the best culinary experience. Our spacious facilities offer a 960-square-foot kitchen and large research suites accommodating 12 to 50 respondents. Amenities include 21' commercial hood, five gas quick connects, three phase power with 450 amps, 8' x 8' cooler, 8' x 8' freezer and a truck-level loading dock. Visit Indianapolis for a fresh perspective on your consumer and see why clients make our kitchen their preferred kitchen.

Phone 800-392-3828
www.herron-research.com

INGATHER
RESEARCH & SENSORY

INGATHER Research & Sensory

Founded 2001 | 25 employees
Cory Balthaser, CEO

INGATHER Research & Sensory® is the blue ocean concept of marketing research in-context. Providing both traditional and alternative qualitative and quantitative research, INGATHER's Unsalted Cracker Lab™ is ideal for new menu testing and includes a full commercial kitchen, bar and restaurant within the space. The Common Sensory™ is perfect for both ingredient and CPG research, housing full consumer testing capabilities with breakout rooms. INGATHER's 12,000-sq.-ft. facility was built by researchers/scientists to meet the evolving sensory needs of today and the innovative in-context needs of the future. Whether it's cleaning products, fragrance, automotive, cosmetics, pharma or gaming, INGATHER can handle your sensory testing needs.

Phone 303-988-6808
www.ingatherresearch.com

KMR Research Studio

Founded 2014 | 12 employees
Helen Karchner, CEO

Recent client demand prompted the opening of The KMR Research Studio. We offer cold taste-testing and beverage research from this state-of-the-art focus group facility located in the true suburbs of the Philadelphia metropolitan area. We offer excellent value in our non-traditional studio with the most important aspect - fresh (non-career) respondents! It's more fiscally economical, professionally inviting and aesthetically pleasing for everyone! We provide a plethora of fresh respondents, largely research naïve and untapped. The KMR firm, established in 2003, has conducted qualitative PMR in over 78 industries nationally, focusing on brand positioning, target audience identification, messaging and communication validation, new product positioning, customer service evaluation, etc.

Phone 610-489-0559
www.KMRResearchStudio.com

The Martec Group

Founded 1984 | 35 employees
Linda Segersin, Director

Relentless. Research. The Martec Group is a full-service global marketing research company celebrating over 30 years of marketing research excellence. Martec supports a vast array of industries, technologies and markets, including automotive/transportation, health care/life sciences, building construction, financial services, energy and food and nutrition. Utilizing Martec's in-house database, which includes sensory-trained panel members, Martec conducts sensory testing and taste testing, including blind studies and in-home testing. Martec's Green Bay, Wis., office features a consumer-based test kitchen where our in-house chef not only prepares menus for focus groups but also prepares and assists in judging recipes submitted in recipe contests.

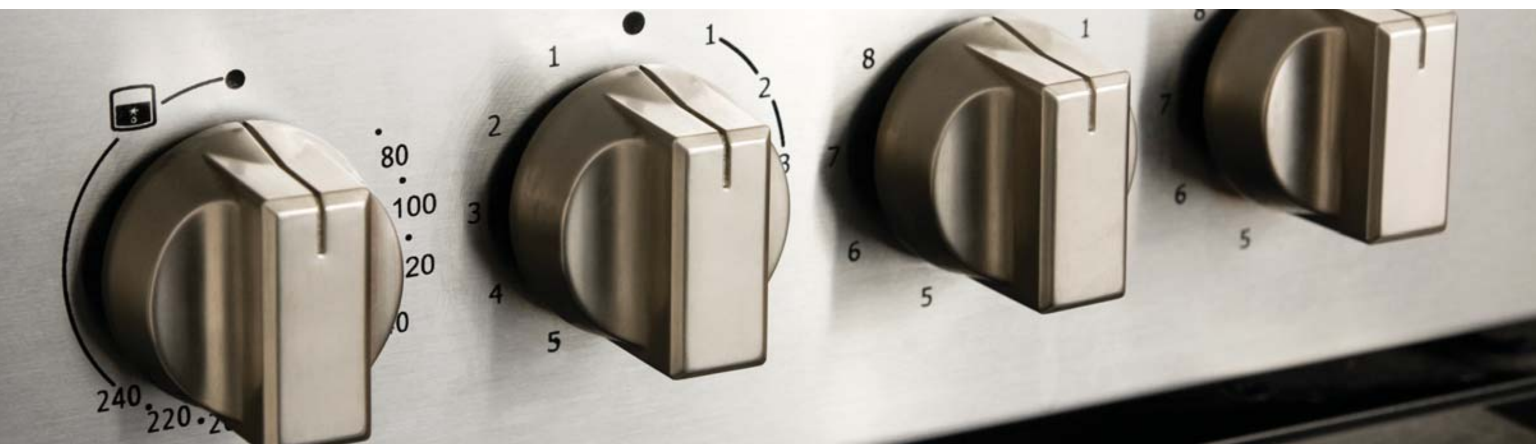
Phone 888-811-5755
www.martecgroup.com

Precision Research

Founded 1959 | 40 employees
Scott Adleman, CEO

Taste tests have a tremendous number of moving parts: product purchasing, check-in, storage, equipment arrangements, recruiting, staffing, survey programming and client-specific needs to name a few. When it comes to executing a successful taste test with so many moving parts you need experience and we have it. Our staff is ServSafe certified with years of experience. Our Chicago location features a comprehensive commercial test kitchen and is centrally located to capture both urban and suburban consumers as well as commercial food service clients.

Phone 847-390-8666
www.preres.com



PVR Research Inc.

Founded 1965 | 54 employees
Donna Pickert, CEO

Come experience the PVR difference and see what our clients are raving about! Our large commercial kitchen space features ample freezer and refrigerator storage, multiple electric and gas connections to configure whatever cooking equipment is required. Our professional staff is skilled to provide any culinary support to help prepare and serve the test products in a timely and effective manner. Our CLT room accommodates up to 50 respondents. Culinary research is one of our core competencies, allowing us to provide the desired level of support on any project so that you can make successful marketing decisions.

Phone 770-232-0322
www.pvr-research.com

Q&M Research Inc.

Founded 1986 | 25 employees
Donald Tucker, CEO

From ready-to-serve products to QSR clients, Q&M Research is your optimal choice in the Chicago and Dallas

markets for all taste-testing needs. Our large testing area and focus group rooms are directly accessible from our commercial kitchens, which are equipped with a 20-foot hood, walk-in cooler, walk-in freezer, ample counter space as well as 400 amps of electrical in each kitchen, gas and plumbing to support commercial/restaurant equipment. Q&M Research Dallas also has a residential kitchen with client viewing. Call your research partner Q&M Research in Chicago and Dallas!

Phone 708-479-3210
www.qandm.com

Q Research Solutions Inc.

Founded 1992 | 70 employees
Patti L. Nelson, CEO

Q Research Solutions (Q) focuses on consumer and sensory research for CPG innovation. Experts in taste-testing consumer research, we pioneered isolating aroma through Q's qPOD® mobile technology that permits "in-use" aromas without cross-contamination. As an integral part of The Culinary Institute of America, we provide technical subject support via our Q adjunct

professor. Q's sensory and consumer research facilities include a wide variety of task rooms to engage consumers throughout product development, state-of-the-art prep kitchen, panel room that holds 40 consumers comfortably and controlled storage.

Phone 732-952-0000
www.qrsglobal.com

Reckner Facilities

Founded 1991 | 225 employees
David Reckner, CEO

Celebrating 25 years of market research excellence, Reckner provides state-of-the-art taste test and product testing facilities located in Milwaukee and New York. Spacious, fully-equipped test kitchens offer ample refrigeration and freezer space, dishwashers, ovens, abundant counter space and more. Personnel are fully-trained in food service and are well-versed on the detailed protocols of product preparation and testing. Highly-tenured staff are engaged and dependable and able to provide the experience, professionalism and flexibility necessary for a successful project. Additional multipurpose space and product testing booths provide flexibility to complete large quotas and complex designs with quick turnarounds.

Phone 215-822-6220
www.recknerfacilities.com

Rocky Mountain Research Focus Groups LLC

Founded 2008 | 8 employees
Cynthia Robinett, Owner/Director

Located in the Citadel Mall in Colorado Springs, Rocky Mountain Research leads the way in market research. With a beautiful 2,200 square foot office

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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,

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Shugoll Research

Founded 1947 | 85 employees
Rick Seale, Executive Vice President

Shugoll Research is the leading CLT and focus facility in the Washington, D.C., Maryland and Virginia areas. Our two spacious facilities in suburban Bethesda, Md., and Alexandria, Va., offer nine rooms with viewing, two

kitchens with freezer and refrigerator storage. Both facilities are conveniently located on the D.C. metro. We can accommodate large taste tests with our flexible room space. Our database of over 120,000 respondents in the D.C. metro area can provide a diverse range of respondent demographics. Our staff is experienced in fulfilling taste tests in sizes from 30 to 350 including multi-day testing studies.

Phone 301-656-0310
www.shugollresearch.com

TasteMakers Research Group

Founded 2010 | 5 employees
Andrea Poe, CEO

TasteMakers Research Group provides common-sense consumer product testing solutions that deliver agile, affordable and authentic consumer insights. Our innovative and cultivated methods are built for consumer product innovators, business strategists and marketers who demand quick, quantitative and cost-effective results. TRG's proprietary PopUp CLT™ (central location test) methodology is a hybrid approach recognized for its unsurpassed ability to conduct in-person consumer product testing, such as taste tests, while achieving breakthrough cost savings and real-time results for clients. Other methodologies currently in use can cost over four times more and take at least three times longer to conduct.

Phone 323-533-5954
www.tastemakersresearch.com

Names of Note

In Memoriam...

■ **William J. (Bill) Callahan Jr.**, who helped found the *MRA* in 1957, died on January 25 in Delray Beach, Fla. He also founded *Callahan Research* in 1970, which merged with *E.J. Wolf Associates* to form *Wolf/Altschul/Callahan Inc.* (WAC). Upon his retirement from WAC, he created *William Callahan Research*. He was an honorary lifetime member of the MRA and held many positions within the organization, including president, board of directors, vice president and others.

■ Oak Park, Ill., research agency *Halverson Group* has hired **Brad Bane** as a managing director.

■ Fort Washington, Pa., firm *M3 Global Research* has hired the following: **Adam Wallace** as director, strategic audience recruitment; **Dan Lockwood** and **Jason Cammarata** as VP market research; **Keri Mills** and **Jamie Galligan** as bid specialists; **Melina Garcia** as a solutions analyst; **Mayumi Kennedy** as quantitative project manager; **Nicolae Bacon** as senior quantitative project manager; **Jeremy Haring**, **Abigail Parker** and **Anna Eibach** as qualitative project manager; **Marta Dinares** and **Gabriel Da Costa** as marketing and panel administrators and **Tiffany Cornes** as account manager.

quirks.com/articles/2016/20160411.aspx

■ In New York, **Linda Lee** has been appointed president, global solutions for *Ipsos InnoQuest*.

■ **Isaac Rogers**, CIO for Nashville, Tenn., firm *20|20 Research*, has been named CEO of the company's tech subsidiary, 20|20 Technology.


Rogers

■ Des Moines, Iowa, researcher *Quester* has appointed **David Guenthner** as vice president of client services.

■ Oslo, Norway, data collector *Norstat* has appointed **Andrea Arnaud** as business developer executive for Norstat Italy.


Arnaud

■ Netherlands-based data collection software firm *Nebu* has appointed **Otto van Linden** as managing director.

■ Data analytics firm *GuestMetrics LLC* has hired **Brendan Reilly** as CEO and **Marco Buchbinder** as president and COO. Reilly has also been appointed as GuestMetrics' chairman of the board and Buchbinder has been named as a member of the board. The firm has also opened its new headquarters in Cambridge, Mass.

■ **Jodie Chamberlain** has joined U.K. researcher *Verve North* as research manager. The following have also been promoted: **Warren Lister** to research director, qualitative; **Vasiliki Georgiou** and **Lucy Dixon** to research manager, qualitative; **Diana Harvey** and **Chermayne Hiew** to community manager; **Roxana Postolachi** to Iasi team leader; **Olly Robinson** to research director; **Laurence Taylor** to design manager; **Ana Garcia** to director, marketing and team; **Helen Fricker** to research manager; **Bianca Stan** to senior executive, data processing and **Eva Bodok** to Web designer.

■ *Twitter*, San Francisco, has named **Leslie Berland** as the new CMO.

■ **Anna Bjorkman** has been promoted to senior research director for Stamford, Conn., firm *RTi Research*.

■ Philadelphia-based researcher *Focus Pointe Global* has appointed **Amy Webb** as national sales manager.

■ In London, insight and strategy consultancy *Firefish* has appointed **Lisa Hill** as managing director for its U.K. qualitative business.


Hill

■ In New York, **Claudia Malley** has been named chief marketing and brand officer for *National Geographic Partners*, a joint venture between National Geographic Society and 21st Century Fox. She will head brand marketing, membership and market research. **John Campbell** has been appointed senior vice president, global media, National Geographic Partners.

■ New York researcher *SHC Universal* has appointed **Lisa Valerio** as global health care community manager. Additionally, SHC's communities now include Switzerland and Austria.

■ *Burke Inc.*, Cincinnati, has promoted **Michael Laux** to vice president, client services manager.

■ *Full Circle Research*, Potomac, Md., has added **Rafael B. Gonzalez** as regional sales director.

■ In New York, **Matt O'Grady** has been named CEO of *Nielsen Catalina Solutions*.

■ *Lighthouse Guild International*, a not-for-profit vision and health care organization based in New York, has appointed **Karen A. Wish** as CMO.

■ **Tue Meier-Poulsen** has been appointed managing director of data services firm *Norstat Denmark*.

Poulsen

■ **Jimmy Jellinek** has joined *Turner Broadcasting System Inc.*, Atlanta, as vice president of content marketing and digital innovation for TBS and TNT. He is based in Los Angeles.

Campion

■ **Matt Campion** has been appointed executive vice president, *Schlesinger Interactive* for Iselin, N.J., firm Schlesinger Associates. Additionally, **Jade Landfried** has been promoted to COO.

Landfried

■ *King Brown Partners Inc.*, a Sausalito, Calif., consultancy of business strategy researchers, has appointed **Paul Peterson** as its new CEO and chairman, effective immediately. Retiring founder and former CEO **Haldane King** will continue to serve as strategic advisor and member of the company's board of directors.

■ London-based research tech firm *ZappiStore* has appointed **Christophe Ovaere** as CMO.

■ Irvine, Calif., firm *MFour Mobile Research* has hired **Christopher Tyau** as project manager. The firm has also added **Farshid Hamidi** as Web developer, **Annie Nguyen** as executive administrator and **Jacob Sabatino** as solutions development representative.

■ In London, movement intelligence firm *Movvo* has appointed **Alexandra Petit** as its customer experience officer.

■ Atlanta research and consulting firm *CMI* has appointed **Wyndy Greene Smelser** as senior vice president of the CMI health care and life sciences practice.

■ Columbia, Md., data management platform *Lotame* has appointed **Doron Wesly** to senior vice president and CMO. He will be based out of the firm's New York office.

■ Winter Park, Fla., digital media and brand response TV agency *Kre8 Media* has named **Jonathan Beazley** as director of marketing analytics.

■ Columbus, Ohio, software and services company *Signet Accel* has appointed **Kimberly Ferguson** as executive vice president of sales and marketing. She will be based in California.

■ Lombard, Ill., firm *The Carlson Group* has hired **Ilicia Manger** to its sales team as account director, strategic partnerships.

Manger

■ Santa Clara, Calif., social analytics firm *NetBase* has appointed **Paige Leidig** as CMO and **Dave Pefley** as CFO.

■ **Shyama Friedenson** has joined Burbank, Calif., media company *STX Entertainment* as executive vice president of international marketing.

■ Reno, Nev., firm *LP Insurance Services Inc.* has appointed **Lindsay Minor** as CMO.

■ Dallas integrated marketing agency *Calise Partners* has appointed **Heather Hendershott** as marketing supervisor.

■ Israel-based consumer insights firm *Treato* has appointed **Greg Gallo** as the company's new chief commercial officer.

■ Costa Mesa, Calif., digital marketing agency *Rauxa* has promoted **Gina Alshuler** from president to CEO. Alshuler succeeds **Jill Gwaltney**, the firm's founder and previous CEO. In addition, the agency has opened a new office in Seattle.

■ **David Salkowski** has joined Detroit research and consulting firm *Morpace Inc.* as its new CFO.


Salkowski

■ *The Detroit Lions* NFL team has promoted **Emily Griffin** to vice president of marketing.

■ Canada-based research and polling firm *Leger* has appointed **Rocco Vernacchio** as vice president, Leger Analytics. He will be based in the firm's Philadelphia office.

■ Baldwinsville, N.Y., firm *Research & Marketing Strategies Inc.* (RMS) has appointed **Mike Brant** and **Jeff Emmi** as practice transformation specialists for the RMS health care team.

■ In Washington, D.C., eye-tracking research solutions firm *Tobii Pro* has hired **John Traynor** as vice president of Tobii Pro Insight Research Services in North America.


Leet

■ **Ben Leet** has joined Berlin firm *Dalia Research* as chief commercial officer, a newly created role.

■ U.K. research agency *Marketing Sciences Unlimited* has appointed **Scott Harwood-Ramsay** to head up its qualitative research team.

■ In New York, music services company *Kobalt Music Group* has appointed **Ryan Wright** as CMO, a newly created position.

■ In Boston, research and intelligence firm *Phronesis Partners* has appointed **Susan Miedema** as director of health care research. She will be based out of New Jersey.


Hunter

■ **Mary Hunter** has been hired to serve as the director of client services for San Diego-based strategic consulting firm *ResearchWorks*.

■ *P2Sample*, an Alpharetta, Ga., sample provider, has engaged research industry consultant **Kristin Luck** in an advisory role to help the firm evaluate its current and future product and service offerings.

■ **Payal Kondisetty** has joined the U.S. team of Canada-based research firm *Leger* in Fort Washington, Pa.

■ **Damian Eade** has returned to London-based health care research firm *Cello Health Insight* to take up the new role of global head of digital.

■ San Antonio marketing services company *Harte Hanks* has appointed **Shirish Lal** as its executive vice president, COO and chief technology officer.

■ *Illumination Research*, a Mason, Ohio, research and consulting firm, has hired **Janelle Zurek** as VP quantitative insights.

■ U.K. media company *The Drum* has hired **Phil Buxton** as its first CMO.

■ In Santa Clara, Calif., Apple subsidiary *FileMaker Inc.* has named **Ann Monroe** as vice president of marketing and a member of the executive team.

■ New York-based data analytics firm *Spreemo* has appointed **Mike Lundberg** as its new chief sales and marketing officer.

■ Lincolnshire, Ill., firm *Zebra Technologies Corporation* has appointed **Jeff Schmitz** as senior vice president and CMO.

■ Cincinnati research and decision support company *Burke Inc.* has promoted **John Thomas** to senior vice president and managing director, Burke Healthcare.

■ *CMI*, an Atlanta-based research and consulting firm, has added A**ndrea Burns** as senior research manager for its client services team.

■ Albuquerque, N.M., advertising and brand research agency *Ameritest* has named **Tom Palmer** as president. Palmer takes over the position from Ameritest founder **Chuck Young**, who will continue in his role as CEO. Palmer will be based in the Chicago office.

■ **Rebecca Jones** has joined Honeoye Falls, N.Y., research firm *KJT Group* as associate director. She will support the global team headquartered in Amsterdam.

Research Industry News

News notes

■ A federal judge has transferred a class-action lawsuit against Melbourne, Fla., firm **Global Marketing Research Services** (GMRS) from Pennsylvania to Florida, citing the time of legal action being filed and consideration of multiple interest factors. The judge ruled that the class-action, filed by Alicia Thompson of Pennsylvania against the research firm, would be transferred to the U.S. District Court for the Middle District of Florida. Thompson initiated legal action against GMRS in June 2015, charging it violated the Telephone Consumer Protection Act (TCPA) by calling cell phone customers in Pennsylvania without first obtaining their consent while conducting their business and political survey research. GMRS motioned to transfer the case to Florida where another class-action suit was already pending against it for similar alleged violations of the TCPA. Both suits contained similar language and the same plaintiff counsel filed both actions. The other suit (Martin v. Global Marketing Research Services) was filed in August 2014 and GMRS cited the first-to-file rule in their motion to transfer.

■ Iselin, N.J., firm **Schlesinger Associates** celebrated 50 years of business in February. The company will be marking the anniversary throughout the year by giving back through its health care panel partnerships, in its local communities, by planting trees for the environment and through a market research education foundation.

■ U.K. firm **BMG Research** has been admitted as a member of the British Polling Council, an association of polling organizations.

■ Warren, N.J., digital data collection firm **Lightspeed GMI** recently celebrated 10 years in its Paris, Munich and 's-Hertogenbosch, Netherlands, offices. The firm has also recently relaunched multilingual versions of its corporate Web site and relocated its 's-Hertogenbosch office in March 2016.

■ **Microsoft**, Redmond, Wash., has tested a prototype of a self-contained data center that can operate below the surface of the ocean, in efforts to reduce the need for air-conditioning and to address the energy demands of computing.

Acquisitions/transactions

■ Shelton, Conn., firm **SSI** has acquired Los Angeles-based researcher **Instantly Inc.** With the acquisition, SSI will expand its scale in online and mobile panels. The majority owner of SSI is HGGC, a middle market private equity firm. JEGI served as advisor to Instantly.

■ Portland, Ore., media measurement firm **Rentrak** has acquired Los Angeles-based **Hollywood Software Inc.**

■ **ComScore**, Reston, Va., has completed its merger with Portland, Ore., firm **Rentrak** to create a new cross-platform measurement company.

■ Researcher **GfK**, Nuremberg, Germany, has acquired Barcelona, Spain, panel provider **Netquest**. The deal was signed and closed on February 4. The acquisition also includes the company's subsidiary Wakoopa, an Amsterdam-based behavioral data firm. Through the deal, GfK will be able to establish new and expand existing digital panels worldwide and expand its cross-media link into Latin America. The acquired business will be allocated to GfK's Consumer Experiences sector and GfK plans to expand Netquest's and Wakoopa's current activities globally. Netquest will continue to operate under its existing brand.

■ Palo Alto, Calif., private equity firm **Symphony Technology Group** has closed the sale of Horsham, Pa., research and analytics firm **AlphaImpactRx** to **IMS Health**, a Danbury, Conn., information and technology services company. AlphaImpactRx's offerings, capabilities and technologies will be integrated into IMS Health to form a foundation for the company's primary market research capabilities.

■ In Lincolnshire, Ill., human resource solutions firm **Aon Hewitt** has acquired **Modern Survey**, a Minneapolis-based employee survey and talent analytics firm.

■ Columbia, Md., performance marketing agency **Merkle** has acquired **dbg**, a U.K.-based independent marketing solutions agency. This is the second in a series of planned European acquisitions for Merkle. It follows the company's 2015 acquisition of Periscopix, a London-based performance marketing and programmatic agency. Tim Berry, who formerly served as president of Merkle's CRM solutions, will assume the role of president of Merkle Europe. Dbg's team will join Merkle's Marketing Solutions Group.

■ France-based communications group **Havas** has acquired a 100 percent stake in **beebop media ag**, a Hamburg, Germany, social media and ambient agency. The agency, renamed Havas beebop GmbH, will integrate into the Havas Worldwide network and be part of the Havas Village Hamburg.

■ Washington, D.C., research solutions

quirks.com/articles/2016/20160412.aspx

and services firm **MarketResearch.com** has completed its acquisition of **The Freedonia Group**, a Cleveland, Ohio, consulting services firm and industry research reports provider. The businesses' complementary assets are being integrated and the acquisition will provide businesses, nonprofit organizations and academia a source of market research across multiple industries.

■ New York-based content marketing firm **Contently** has acquired St. Paul, Minn., content marketing analytics and tracking company **Docalytics**.

■ In Armonk, N.Y., **IBM Watson Health** is planning to acquire **Truven Health Analytics**, an Ann Arbor, Mich., cloud-based health care data, analytics and insights provider for $2.6 billion.

■ **MARU Group**, a U.K. professional services firm, has acquired U.K. firm **eDigitalResearch**. All current eDigitalResearch (edr) employees will retain their roles in the new independent company. Following the close of the transaction, the new independent business will operate under the name maru/edr. The terms of the transaction were not disclosed.

■ On January 4, **AMS Ventures Inc.**, a company established by partners Amy Shields, Michael Mermelstein and Steve Zuppas, finalized the purchase of **Nichols Research** (previously Nichols Research Inc.) for the purpose of broadening the depth and breadth of the company's reputation, products and services. The headquarters of the new company will remain in Fremont, Calif., with additional research facilities in San Francisco, San Jose/Sunnyvale and Fresno, Calif. Shields will take up the role as president, Mermelstein as executive vice president and Zuppas as CFO.

■ New York omnichannel marketing firm **Rakuten Marketing** has acquired San Francisco-based product intelligence company **Manifest Commerce**.

■ **IBM**, Armonk, N.Y., has completed the acquisition of Columbus, Ohio, digital marketing and creative agency **Resource/Ammirati** to join IBM Interactive Experience, the firm's digital agency. Financial terms were not disclosed.

Alliances/strategic partnerships

■ New York media technology company **Yieldbot** has formed a strategic alliance with Chicago-based researcher **IRI** to help shopper marketers measure and respond to first-party data targeting.

■ **Marketo Inc.**, a San Mateo, Calif., marketing software and solutions provider, and **Wunderman**, a New York-based digital agency, have formed a strategic partnership to create a solution jointly called "insight-driven engagement," which joins Marketo's platform with Wunderman's approach insights and engagement, allowing brands to engage customers across all digital channels and measure how their marketing spend drives revenue.

■ **Verto Analytics**, a Finland-based audience measurement solution provider, has formed a strategic partnership with China-based Internet measurement provider **iResearch Consulting**. The partnership brings Verto's audience measurement services to China and enables iResearch to use Verto as a strategic partner to deliver Chinese media measurement data to U.S. and European-based companies.

■ Boston-based consumer insights firm **Crimson Hexagon** has formed an OEM partnership with **Birst**, a San Francisco-based business intelligence and analytics firm, allowing enterprises to integrate and combine Birst's analytics technology within Crimson Hexagon's analysis of unstructured social data.

Association/organization news

■ The board of the **Marketing Research Institute International** (MRII), Ann Arbor, Mich., has elected Lisa Courtade, executive director, global customer and brand insights for pharmaceutical firm Merck, as board president for 2016. She succeeds Wayne McCullough, director of the Office for Health Equity and Inclusion at the University of Michigan Health System, who now becomes immediate past president. The board also elected Jon Last, president of Sports and Leisure Research Group, as president-elect and Bart Weiner, principal at BW Consulting, as treasurer. Five new members were also elected: Susan Frede (Lightspeed GMI), Kathy Millich (IBM), Jeffrey Hunter (Market Framework), Paul Hunter (dunnhumby and Miami University) and Shelly Ray (MMR Research Associates). They replace retiring board members Gunilla Broadbent (GB Global Positioning), Michelle Elster (Rabin Research), Carol Galvin (IBM), Ed Sugar (Interviewing Service of America) and Jeffrey Welch (Zylun Insights).

Awards/rankings

■ Waukesha, Wis., advertising, marketing and communications firm **The Roberts Group** was recognized for excellence from the 2015 Cancer Awareness Advertising Awards (CAA Awards) for its advertising and marketing efforts. It received the top award, Judges Choice, for its breast cancer awareness campaign with Saint Francis Healthcare System in Cape Girardeau, Mo. The firm also received two Gold and two Silver Awards from the CAA Awards.

■ Irvine, Calif., firm **MFour Mobile Research**'s Surveys on the Go application is among Apple's top apps, ranking 80 in the lifestyle section of the app store among more than 2 million applications.

■ Oslo, Norway, research solutions provider **Confirmit**'s Horizons Version 19 platform has been named a 2016 CUSTOMER magazine Product of the Year award winner by media company TMC.

■ India-based credit rating agency **SMERA Ratings Ltd.** has assigned an SE1 A rating to India-based firm **MRSS India Ltd.** on parameters of highest performance capability and high financial strength.

■ Software-as-a-service platform **OdinText Inc.** was named the winner of the American Marketing Association's 2016 Robert J. Lavidge Global Marketing Research Prize for innovation in the field. The Lavidge Prize recognizes a marketing research/consumer insight procedure or solution that has been successfully implemented and has a practical application for marketers.

■ **Disney** has been named the world's most powerful brand, according to London-based brand valuation and strategy consultancy **Brand Finance**. The brands are evaluated to determine which are the most powerful based on factors such familiarity, loyalty, promotion, marketing investment, staff satisfaction and corporate reputation and which brands are most valuable and ranked to form the Brand Finance Global 500. Lego came in second in the most-powerful brand ranking, followed by L'Oréal, PWC and McKinsey. Apple was ranked as the world's most valuable brand, with its brand value up 14 percent due to the success of the iPhone 6 and iPhone 6s. Google came in second, followed by Samsung, Amazon and Microsoft.

■ **The Verge** has been appointed the most valuable tech Web site in the world, according to Netherlands-based social media software company **Coosto**. The firm used an algorithm, called PR Value, that calculates the monetary value of mentions in articles on news sites, blogs and forums and in social media messages. The algorithm is based on several factors, such as (estimated) impression rate, engagement rate and authors' influence rate which are linked to ad rates of the specific platform. A mention in one of Verge's articles is worth €12,019. Softonic ranked second as the most valuable tech site, followed by Wired and TechRadar.

New accounts/projects

■ Oslo, Norway-based research firm **Confirmit** has been selected by **Home Innovation Research Labs**, an Upper Marlboro, Md., research, testing and consulting firm in the home building industry, to power its survey research.

■**Nielsen**, New York, has been named the global measurement provider for retail and consumer information for U.K. consumer goods company **RB** (formerly Reckitt Benckiser). Separately, Nielsen has been named the preferred measurement and analytics provider for retail and consumer information for West Des Moines, Iowa, supermarket chain **Hy-Vee**.

■ New York brand intimacy agency **MBLM** has created a brand program for New York-based personalized video engagement firm **SundaySky** with focus on brand essence, identity and a redesigned Web site.

■ **Snapchat**, Venice, Calif., has selected New York-based **Nielsen**'s Digital Ad Ratings to measure the audiences of its 3V advertising on mobile devices. Snapchat's 3V ads are full-screen, vertical videos that users view by choice within the premium and curated contexts of Snapchat's Discover feature and Live Stories. The use of Digital Ad Ratings is an expansion of Snapchat's current measurement offerings and its first venture into campaign ratings measurement from an independent provider.

New companies/new divisions/relocations/expansions

■ **The Interactive Advertising Bureau** (IAB) has launched the IAB Data Center of Excellence, a new independently funded unit within IAB. The Data Center's mission will be to help advertisers and marketers operationalize their data assets while maintaining quality, transparency, accountability and consumer protection. It will also fund industry research projects, provide benchmarks, create insights on data management across platforms, host data-focused events and develop industry best practices, guidelines and standards for privacy, data security and consumer data protection. Additionally, it will produce educational materials including certification, videos and Webinars. Joe Zawadzki, CEO of New York technology company MediaMath, has been selected to head the Data Center of Excellence board of directors.

■ Nuremberg, Germany, researcher **GfK** is changing its corporate structure in Germany, effective April 1. The business currently consists of two separate entities that will combine to enable the firm to offer its services in a more integrated manner. Under the direction of Michael Müller, who has been appointed managing director of GfK Germany, the operational activities of the two sectors, Consumer Experiences and Consumer Choices, will be combined. The firm has also reorganized its management board with effect from January. In April, Siegfried Högl will assume global, cross-sector responsibility for business with clients from the automotive industry and Wolfgang Wanders, whose present responsibilities include managing part of the Consumer Choices business in Germany, will be put in charge of the global Point of Sales Measurement business (trade panel).

■ India-based project management and data collection firm **NextON Services** has opened a new office in Ras al-Khaimah, UAE. Saurabh K has been promoted to director of global accounts and will head the new office.

■ U.K. researcher **Join the Dots** has opened its first international office in Singapore, to be headed up by Karen Schofield, who takes the position of managing director, Singapore and who was previously the company's innovations director.

■ **Culture Engineers**, a London-based consulting boutique founded by Ashley Walker, has launched. The services offered by Culture Engineers include advising clients on internal and external communications strategy, employee experience and employer branding and developing organizations' shared vision, values and rollout plans.

■ Spokane, Wash., firm **Strategic Research Associates** has opened a new focus group research location in Federal Way, Wash.

■ Branford, Conn., firm **Touchstone Research** has launched its new division, Touchstone VR, to provide consumer insights and marketing research services to the virtual reality and augmented reality industries.

■ Culver City, Calif., research solutions firm **dataSpring** has opened a new operations hub in Manila, Philippines. The decision to relocate the operations hub to a bigger office is in line with the company's new brand and its service expansion.

■ In Boston, brand communications and integrated marketing services firm **PARTNERS+simons** has launched a life sciences strategic business unit to be led by Pat McGloin. The firm has also appointed Andrew Pelosi as general manager and Stephanie Rogers as EVP of strategy and analytics. Additionally, Bob Minihan will add technology to his responsibilities as chief creative officer.

■ London-based media and digital marketing communications company **Dentsu Aegis Network** has launched Interprise, a full-service global agency specializing in B2B solutions, to be led by Stuart Giddings as global president. Headquartered in London with offices in New York, San Francisco, Singapore, Hong Kong and Sydney, the new agency will expand into other major markets during 2016. Interprise will work with other Dentsu Aegis Network agencies to support new and existing brands with their B2B requirements. The existing specialist B2B media team across the Carat Enterprise network will be integrated within Interprise.

■ **Invoke Solutions**, a Waltham, Mass., online research firm, has launched the Invoke Media & Entertainment practice under the leadership of Kathy Alexander, vice president of research and insights. The new practice consists of a suite of tools and solutions that enable media companies to optimize content, develop audiences and build brands using Invoke's platform for hosting large-scale online research. Alexander has also assembled a team of professionals to serve media and entertainment companies, including David Klein, vice president of product strategy; Holly Williams, vice president of sales and Michael Berka, director of sales.

■ New York media agency network **Maxus Worldwide** has launched Maxus Technology Consulting, a new division which will advise businesses on the most effective use of technology in their marketing programs. Maxus Technology Consulting will be led by David Kaganovsky, worldwide CIO, along with Gary Revenson, worldwide director of technology, and Damian Blackden, worldwide chief strategy officer.

Research company earnings/ financial news

■ Nuremberg, Germany, research firm **GfK** returned to organic growth during the 2015 financial year. Sales increased by 6.3 percent compared to the previous year to approximately €1.54 billion, with organic growth of 1.1 percent.

■ Stamford, Conn., researcher **Gartner Inc.** has reported total revenue of $643.8 million for fourth-quarter 2015. Excluding the negative impact of foreign exchange, quarterly revenues increased 16 percent in 2015. For full-year 2015, total revenue was $2.163 billion, an increase of 7 percent over 2014, but excluding the negative foreign exchange impact, revenues increased 13 percent.

■ In New York, enterprise feedback management firm **Questback** has reported that it increased enterprise revenues by 40 percent in 2015. Additionally, as of February 2016, CEO Frank Møllerop will relocate to an expanded New York City office.

■ During full-year 2015, Boston-based market intelligence firm **InCrowd**'s sales increased by over 70 percent and the number of "answers" sold and delivered from its crowd of physicians, nurses, managed care providers and pharmacists increased by 106 percent compared to the previous full year. Revenue from large, multi-brand clients grew by 97 percent and revenue from global pharmaceutical firms grew 90 percent.

■ **Nielsen**, New York, has reported revenues of $1.62 billion for the fourth quarter of 2015, down 0.6 percent due to the impact of foreign exchange, but up 5.6 percent on a constant currency basis, compared to the fourth quarter of 2014. Revenues were $6.17 billion for the full year of 2015, down 1.8 percent due to the impact of foreign exchange, but up 5.0 percent on a constant currency basis, compared to 2014.

■ Cambridge, Mass., firm **Forrester Research Inc.** has reported total revenues of $81 million for fourth-quarter 2015 compared to $80.7 million for fourth-quarter 2014. Research revenues were flat and advisory services and events revenues increased 2 percent compared to fourth-quarter 2014. On a constant currency basis, research revenues increased 2 percent and advisory services and events revenues increased 4 percent compared to fourth-quarter 2014. Total revenues were $313.7 million, compared to $312.1 million for the same period in 2014.

■ Paris-based researcher **Ipsos** has recorded revenue of €524.4 million in the fourth quarter of 2015, an increase of 4.7 percent compared to the same quarter in 2014. At constant exchange rates and scope of consolidation, revenue was down 1 percent, a slightly better performance than in the third quarter (-2 percent) and equivalent to the full-year performance in 2015 (-1 percent). Over the full-year in 2015, the firm recorded revenue of €1,785.3 million, an increase of 6.9 percent. Currency effects were positive throughout the year and boosted revenue by 7.3 percent overall. Scope effects had a further positive impact of 0.6 percent. The firm says its overall revenue was below expectations due mostly to the persistent weakness of its business in emerging markets and at Ipsos Connect.

■ Reston, Va., firm **comScore** has reported fourth-quarter GAAP revenue of $97.7 million, an increase of 8 percent compared to the fourth quarter of 2014. GAAP income before income taxes was $6.5 million. GAAP net income was $4.4 million or $0.11 per diluted share. The firm reported an annual revenue of $368.8 million, an increase of 12 percent compared to 2014.

■ Menlo Park, Calif., on-demand insights platform **Quantifind** has closed a $30 million funding round led by global investment firm Cathay Innovation. Previous investors Redpoint Ventures, U.S. Venture Partners, Comcast Ventures, Iris Capital and AME Cloud Ventures also joined the round. This round of funding will be used for market expansion efforts, product development and allow the company to double staff in its Menlo Park headquarters. The firm will also focus on growing the sales and customer success teams, as well as the data science and engineering teams.

CALENDAR OF EVENTS

••• can't-miss activities

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/.

The Strategy Institute will hold its Marketing to Millennials for Financial Services event on **April 20-21** at the New York Hilton Midtown Hotel in **New York**. Visit www.millennialfinancialsummit.com.

The Cleveland AMA will hold its 2016 Cleveland AMA Market Research Conference on **April 21** at the DoubleTree Hotel Cleveland South in **Independence, Ohio**. Visit www.clevelandama.com.

Unicom will hold its Testing Showcase Midlands conference on **April 21** in **Birmingham, U.K.** Visit www.unicom.co.uk.

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.

Unicom will hold its Testing Showcase Dublin conference on **May 19** in **Dublin**. Visit www.unicom.co.uk.

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.

The Strategy Institute will hold the 6th Annual Digital Marketing for Financial Services Summit on **June 2-3** at the Sheraton Centre in **Toronto**. Visit www.financialdigitalmarketing.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.

IIR will hold its Marketing Analytics and Data Science conference on **June 8-10** at the Hilton Financial District in **San Francisco**. Visit www.iirusa.com/analytics/home.xml.

The Conference Board will hold its Annual Brand Conference on **June 9-10** at the Westin New York at Times Square in **New York**. Visit www.conference-board.org.

EphMRA will hold its Healthcare Business Intelligence/Analysis Conference on **June 21-23** in **Frankfurt, Germany**. Visit www.ephmraconference.org/home.

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

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

The Strategy Institute will hold its Digital Customer Experience Strategies Summit Europe event on **June 30-July 1** in **Central London**. Visit www.digitalcustomerexp.co.uk.

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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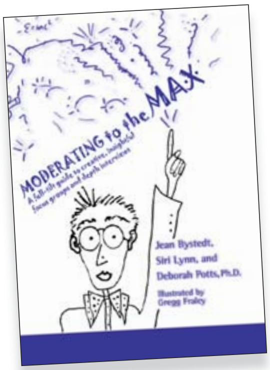

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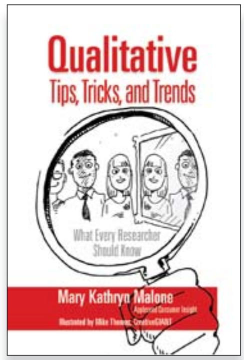

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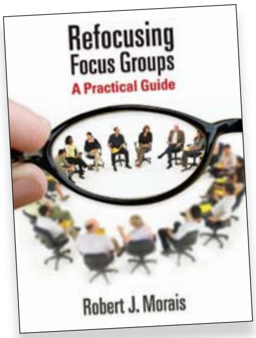

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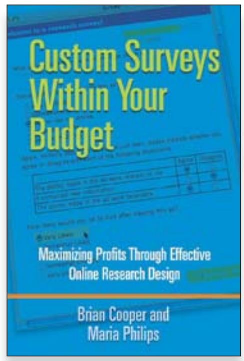

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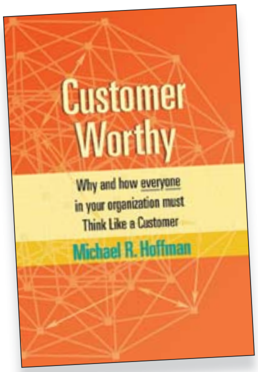

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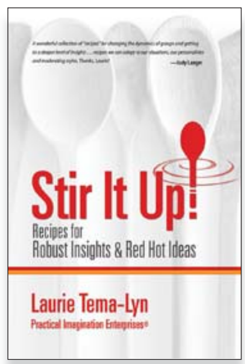

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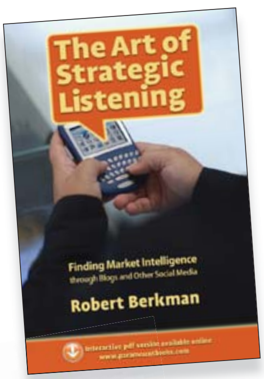

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BEFORE YOU GO ••• Conversations with corporate researchers

10 minutes with...

Kristin Guthrie
Vice President, Customer Experience, Honeywell

"Results showed that the radiologists were more meticulous in reading medical image outcomes when a photo was part of the patient file. They went above and beyond what they had been asked to evaluate."

Read the full interview at quirks.com/articles/2016/20160422.aspx.

Are there any research methodologies that you feel are overlooked by others in the MR industry?

I'm a big fan of using max-diff. The results are easy to interpret and communicate, as they can be placed on a 0-to-100-point scale, and sum to 100. It's a great way to measure the relative priority for a large set of attributes. What are customers willing to trade? The results make it much easier for us to take action compared to a standard ranking or rating scale.

How are you using secondary research to influence your organization?

In Honeywell's Air Transport business, we work directly with both OEM customers – aircraft manufacturers – and end users – airline operators/aftermarket. We are fortunate that many of our OEM customers collect satisfaction data from the airline operators. So we are able to combine their data with our primary research to build a robust 360-degree view of how we're performing – from both a supplier and aftermarket perspective.

In fact, we now import this secondary research into our CRM system, Salesforce.com. We've created a dashboard that incorporates our primary research with the OEM survey data and builds a health scorecard. It provides an at-a-glance visual display of where we need to focus in order to improve the health of our relationship with each customer. The dashboard is tied systematically to a get-well plan that is actionable and traceable.

How have you applied research to add a human element to the B2B environment? What changes have you seen since implementing?

I use a lot of consumer behavior research and cognitive psychology studies to emphasize the impact of soft initiatives. By soft initiatives, I mean any effort that focuses on how it feels to do business with our company. The tone we use, the words we choose or the manner in which we convey information. It all matters. And there's science and data to back it up. So the discussion changes from, "Here's what I think we should do – trust me," to "Here's what I think we should do and why I know it'll make a difference."

For example, we now proactively seek photos of our customers and add them to our CRM system. The genesis of this initiative was a study conducted by the Radiological Society of North America. In this study, researchers measured the impact of adding patient photos to their files. Results showed that the radiologists were more meticulous in reading medical image outcomes when a photo was part of the patient file. They went above and beyond what they had been asked to evaluate. That's exactly what I want to encourage our customer service representatives to do – to go above and beyond what a customer specifically requests. To consider the customer on the whole rather than as a transaction. By adding customer photos to our CRM system, we hope to achieve this psychological shift.

What do you see as the biggest challenge to B2B MR today?

Ensuring that we are reaching a broad swath of personas within each company. In B2B, you can't solicit feedback from a single individual. Depending on the topic, we might need to gather input from 10 to 20 different influencers and personas from a single organization. Building a representative sample is critical.


We’ve got this.