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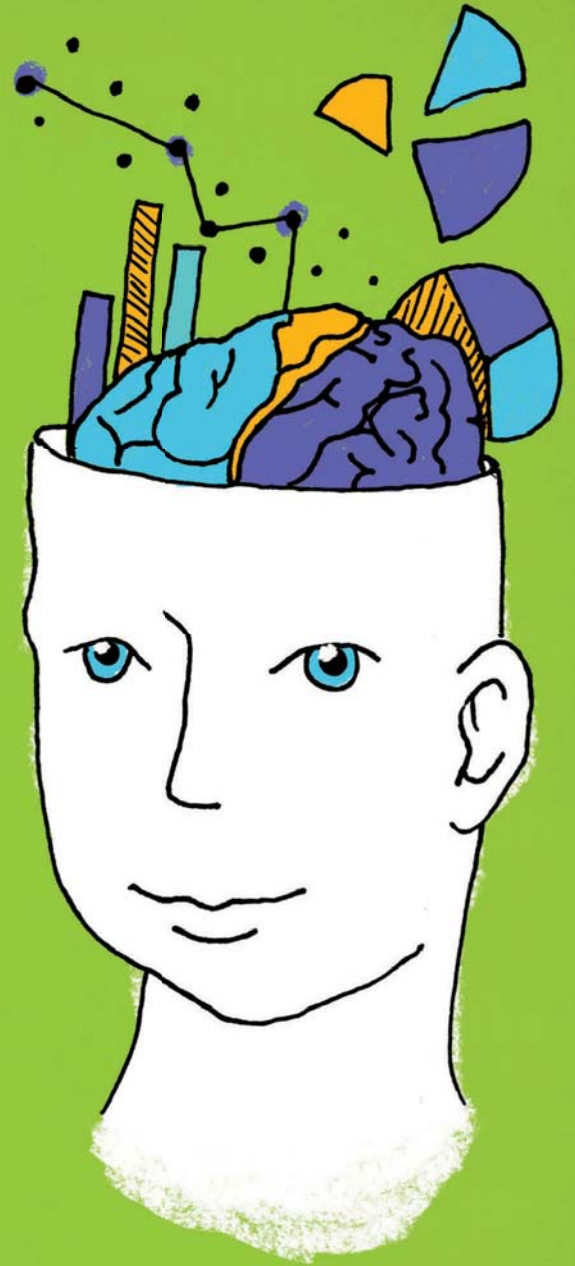


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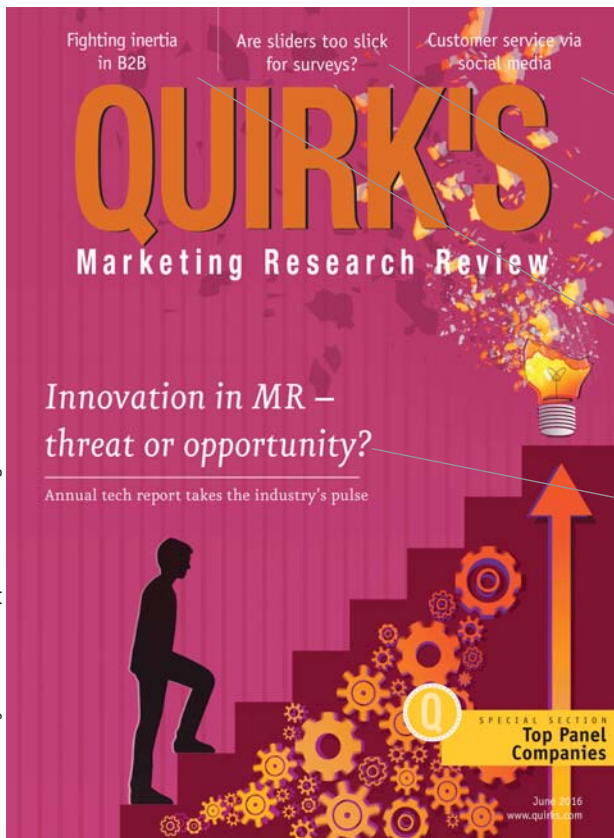
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Quirk's Marketing Research Review  
4662 Slater Road | Eagan, MN 55122  
651-379-6200 | [www.quirks.com](http://www.quirks.com)

Publisher • Steve Quirk  
[steve@quirks.com](mailto:steve@quirks.com) | x202

Editor • Joseph Rydholm  
[joe@quirks.com](mailto:joe@quirks.com) | x204

Digital Content Editor • Emily Koenig  
[emilyk@quirks.com](mailto:emilyk@quirks.com) | x210

Circulation Manager • Ralene Miller  
[ralene@quirks.com](mailto:ralene@quirks.com) | x201

Production Manager • James Quirk  
[jim@quirks.com](mailto:jim@quirks.com) | x206

Directory Sales • Ilana Benusa  
[ilana@quirks.com](mailto:ilana@quirks.com) | x213

V.P. Sales • Evan Tweed  
[evan@quirks.com](mailto:evan@quirks.com) | x205

Sales • Lance Streff  
[lance@quirks.com](mailto:lance@quirks.com) | x211

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Can't wait until September to read more about your peers? Check out Quirk's 2015 report: [www.quirks.com/PDF/CorporateResearchReport.pdf](http://www.quirks.com/PDF/CorporateResearchReport.pdf)



## Q // E-newsworthy

### Disgust, sadness, hope and anger: Observations from the 2016 presidential race

[quirks.com/articles/2016/20160426-1.aspx](http://quirks.com/articles/2016/20160426-1.aspx)

### 3-step research process for identifying your product's triggers and barriers

[quirks.com/articles/2016/20160426-3.aspx](http://quirks.com/articles/2016/20160426-3.aspx)

### Top 10 most intimate brands: Study highlights how emotions impact brand relationship

[quirks.com/articles/2016/20160425-2.aspx](http://quirks.com/articles/2016/20160425-2.aspx)

## Q // Noted Posts

### QuirksBlog.com

#### Saying goodbye to Dos Equis' 'most interesting man'

[quirksblog.com/blog/2016/04/08/](http://quirksblog.com/blog/2016/04/08/)

#### 10 commandments for keeping up with the pace of change

[quirksblog.com/blog/2016/03/21/](http://quirksblog.com/blog/2016/03/21/)

#### Recent study finds changes in brand engagement

[quirksblog.com/blog/2016/03/10/](http://quirksblog.com/blog/2016/03/10/)

### ResearchIndustryVoices.com

#### How Facebook reactions are changing social research

[researchindustryvoices.com/2016/04/27/](http://researchindustryvoices.com/2016/04/27/)

#### 11 mistakes to avoid when running an online MR community

[researchindustryvoices.com/2016/04/08/](http://researchindustryvoices.com/2016/04/08/)

#### The role of emotional impact in lowering ad skip rates

[researchindustryvoices.com/2016/04/07/](http://researchindustryvoices.com/2016/04/07/)

### ResearchCareersBlog.com

#### 10 tips for attracting and retaining Millennial talent

[researchcareersblog.com/2016/04/14/](http://researchcareersblog.com/2016/04/14/)

#### What you need to know about non-compete agreements

[researchcareersblog.com/2016/04/04/](http://researchcareersblog.com/2016/04/04/)

#### 7 tips for mastering online job interviews

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# In Case You Missed It

news and notes on marketing and research

## ●●● insurance research

### Insurance shoppers not filling in all the blanks

A survey conducted by online insurance-shopping platform CoverHound found that 51 percent of quoted insurance shoppers provided inaccurate information either by accident or intentionally. Many shoppers requested a quote without providing correct information or forgot to include some important information to carriers. Millennials provided inaccurate information by accident or intentionally 6 percent more than their older, Baby Boomer counterparts. Homeowners were more accurate than renters, with renters being 4 percent more likely to omit or provide inaccurate information versus homeowners.



Comparing shoppers self-reported as “currently insured” and “uninsured,” currently insured shoppers are 5 percent more likely to omit or provide inaccurate information either intentionally or by accident. CoverHound found only a small difference between lower- and higher-risk shoppers. Compared to lower-risk shoppers, only 2 percent more of the higher-risk shoppers omitted or provided inaccurate information either intentionally or by accident. Men and women were also the same: Nearly the same percent of male and female shoppers omitted or provided inaccurate information either intentionally or by accident.



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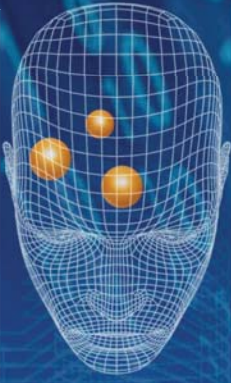
## ●●● food research

### Our sandwich choices are changing

Consumers eat an average of 3.7 sandwiches per week, which has remained stable over the past few years. However, consumers are now eating a wider variety of sandwiches and sourcing them from a greater variety of locations as they look for new, unique foods, according to the 2016 Sandwich Consumer Trend Report from Chicago researcher Technomic. While burgers are still consumed most often of all sandwich varieties measured, other varieties – including deli salad, breakfast, flatbread and ethnic sandwiches – are gaining on burgers.

In other findings, the rise of all-day breakfast is creating new opportunities for breakfast sandwiches: 27 percent of consumers say they are buying breakfast sandwiches outside of typical breakfast hours more often now than they were a year ago. Consumers increasingly demand mini sandwiches that they can eat as a snack (37 percent, up from 31 percent in 2012). And chain restaurants may benefit from differentiating sandwich offerings: 36 percent of consumers overall and 47 percent of Millennials think that chain restaurants all offer very similar sandwiches.

pet owners



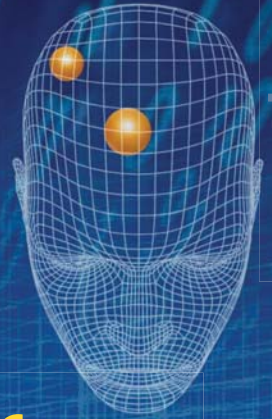
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# Gallup article another example of qual's resurgence

It's largely anecdotal and unscientific, but I've observed a welcome change in the dialog around qualitative research. For a while there, it seemed like versions of the same old "focus groups are dead" argument were popping up with annoying regularity. And you could always count on some hackneyed reference to Steve Jobs hating focus groups being included in the blog post or article or op-ed.

But lately I've noticed more and more voices, at conferences, in articles and casual conversations, singling out qualitative in all its forms – from good-old focus groups to mobile ethnography – as a difference-maker, the method that generated the customer insight that convinced the CEO or awakened the engineers to the flaws in their design.

In a recent article posted on researcher Gallup's Web site ("For B2B companies, customer surveys aren't enough," <http://bit.ly/iTpHVnb>), the firm's Craig Kamins promotes key account reviews for B2B firms and emphasizes the value of their qualitative nature. "Quantitative measures uncover only so much about the relationships between a business-to-business company and its customers. To understand how its customers really feel, a company must

also embark on a qualitative journey, which means having actual conversations with customers," he writes.

He offers an anecdote in which Gallup interviewed the CEO of a major food distribution company on behalf of one of its clients and found out that the company was planning to let go of the client vendor. "A customer survey most likely would have shown that the food distributor was satisfied with the vendor," he writes. "However, that survey alone might not have revealed how close the vendor was to being let go. Fortunately, Gallup connected its client with the food distributor to rectify the situation. But without that face-to-face conversation, the client most likely would never have known the status of its account – until it was too late."

That's an extreme example, I grant you, but illustrative nevertheless of the value of dialog.

Elsewhere in this month's issue we have two articles that look at the role of inertia in the B2B customer's purchasing habits and a qualitative approach such as the key account review seems like a great way to uncover and then investigate the causes of inertia or any other similar problem related to the sales and vendor selection process.


When considering potential account review interviewees, Gallup recommends including a range of accounts that fall into one of three categories: **high-performing relationships**, characterized by



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

high growth, a strong relationship and strong product penetration; **stagnant relationships**, characterized by low growth, a good relationship and weak or stagnant product penetration; and **struggling relationships**, characterized by declining growth, an adversarial relationship and shrinking product penetration.

Once the conversations are complete, the key, of course, is doing something with what you learn. For its part, Gallup briefs senior leadership and individual account teams on the findings. "Leaders typically take action on the more systemic findings," Kamins writes. "However, some problems or opportunities raised at the account level can be addressed only at the executive level ... Stakeholders also might talk about unique business opportunities for the B2B company that they might not have relayed to customer leadership through the normal sales or business development channels. Some of these opportunities might be in the early stages of development or go beyond the company's areas of expertise. Nevertheless, even a cursory discussion of the opportunity might provide the company with a chance to take its relationship with the customer to a higher level." 



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# IN FOCUS

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



## // Survey Monitor



••• alcoholic beverage research

### Beer drinkers happy to be awash in choices

Tastes change with the season

What a time to be alive – at least according to beer drinkers. Nearly nine in 10 (88 percent) beer drinkers agree that it's a great time to be a beer lover. When looking more closely at what it is about beer they love so much, 70 percent say they enjoy trying new types of beer and nearly two in three (64 percent) are fans of local brews. The latter is especially true of craft beer drinkers, 86 percent of whom are fans of local beer, compared

to 77 percent of those who prefer import beers and 60 percent of domestic non-craft beer drinkers.

Those in their 30s stand out from the crowd in their passion for beer. Among beer drinkers in this age group, 95 percent say it's a great time to be a beer lover and 85 percent enjoy trying new types of beer. They're also more passionate fans of local brews than the average beer drinker (76 percent).

These are some of the results of The Harris Poll of 2,115 U.S. adults (ages 21 and older), including 913 who drink beer at least several times per year, surveyed online.

As the weather changes, so do the taps, with spring seasonal brews

replacing the winter drafts. When it comes to beer style, lagers are tops, with 30 percent of beer drinkers saying a lager is their preferred choice. However, 40 percent of beer drinkers say their favorite beers change with the season. Millennials may welcome the change most as they're more likely than any other generation to modify their tastes with the seasons (56 percent vs. 42 percent Gen Xers, 26 percent Baby Boomers, 21 percent Matures).

"It's certainly a good time to be a beer lover," says Danelle Kosmal, VP of Nielsen's Beverage Alcohol practice. "As Americans continue to enjoy some of their favorite traditional lagers, they also have a seemingly unlimited set of options when it comes to styles and new flavors. Whether it's with a new session IPA, a farmhouse ale or a refreshing summer flavor, there are plenty of reasons for beer lovers and brewers alike to be excited about their opportunities in beer."

Perhaps just as critical as the contents of your pint glass is what's on the plate next to it. Pizza tops the list of foods beer drinkers say is the best to eat while sipping a cold one (28 percent), which comes as no surprise since a separate Harris Poll found that pizza also ranked as the No. 1 comfort food and beer beats out all other alcoholic beverages as the top alcoholic beverage to wash down a slice. Burgers (10 percent) and wings (7 percent) round out the top three favorite foods to pair with a beer.

*This Harris Poll was conducted in English, within the United States between February 17 and 22, 2016 among 2,115 adults (aged 21 and over), among whom 913 drink beer at least several times per year. 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*



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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 the panel, no estimates of theoretical sampling error can be calculated.



## ●●● the internet of things Convenience, security main benefits of a connected home

### Some privacy worries

Consumer awareness of the connected home is growing quickly, according to findings released from connected home studies that were fielded by Kelton Global and Research Now in the U.S. earlier this year. Commissioned by Nest, the studies were designed to uncover consumer sentiment about the connected home market. Findings include: 81 percent of Americans either own or are interested in purchasing a connected home product in the next year; to Americans, the main benefit of having a connected home product is increased convenience (54 percent), followed by increased security (44 percent), a reduced energy bill (38 percent) and boosted home value (21 percent); 38 percent of Americans are

more interested in connected home products today than they were six months ago.

The increased interest is also reflected in the retail environment. "Connected home products like the Nest Thermostat are among one of the fastest-growing categories in the retail environment," says Amanda Parrilli, director of connected home, Home Depot. "And considering the connected home is really just starting to take off, the potential for the market is incredibly exciting."

The average connected consumer is family- and home-oriented. An overwhelming 89 percent said spending time with family is their first priority, yet approximately half (51 percent) rarely have enough time in the day to do all they need. Perhaps that's why 63 percent wish that their home could just take care of itself. Fifty-six percent feel it's more important that their home is comfortable than looks good and 73 percent love their home and want to live in it for a long time.

Increased safety and security continue to be compelling reasons to integrate connected home technology, with 44 percent of Americans indicating this as a key benefit of having connected products. Fifty-four percent value the convenience they offer, such as the ability to monitor and control their home from anywhere.

Environmental benefits and reducing monthly bills and are also key motivators for consumers to install connected home products, with 38 percent pointing to reduction in home energy bills as a benefit. Fifty-nine percent of Americans also indicated they worry about their energy consumption.

Despite growing awareness of connected home products like thermostats, Americans are concerned about keeping their personal information secure online (82 percent) and worry that the technology in their home will quickly become outdated (43 percent). Understandably, they are willing to pay extra for high-quality electronics in their homes (63 percent). Bottom

line, Americans just want the technology in their home to work well together (86 percent).

Awareness of connected home brands gradually increases with household income levels. However, across multiple income levels, more than half of Americans can name at least one connected home brand. When asked which brands in the "connected or smart home" space came to mind, 21 percent named Nest as the top brand, followed by Apple (12 percent) and Samsung (8 percent).

The Kelton Global/Nest Connected Home Survey was fielded between April 18, 2016 to April 20, 2016 among 1,018 nationally representative Americans ages 18 and older. Quotas were set to ensure a reliable representation of the U.S. population 18 and older. The margin of error for this study is plus or minus 3.1 percentage points.

Additionally, Kelton Global conducted seven studies of home electronic brand and product awareness from August 5, 2013 to January 5, 2016, with 500 to 1,000 responses per study consisting of Americans ages 25 to 65. All survey participants are homeowners, decision-makers in their household about energy, own smartphones, have a household income of \$60,000 or more and are engaged with technology. The margin of error for these studies ranged from plus or minus 2.0 to 3.4 percentage points.

The Research Now/Nest Connected Home Survey was fielded between January 22, 2016 to January 25, 2016 among 614 geographically-representative U.S. homeowners, aged 25 to 65, who are decision-makers in their household about technology and have a household income of \$60,000 or more. The margin of error for this study is plus or minus 3.9 percentage points.





●●● consumer psychology  
**Clean home =  
 healthy home**

Housecleaning is more than  
 de-cluttering

A new consumer survey confirms that spring is the favorite time of year for home cleaning, with 45 percent of people cleaning during the spring season. But it turns out that spring cleaning is about much more than just organizing and de-cluttering. The survey found that one of the primary motivators for deep cleaning was to eliminate unhealthy elements from their homes. In short, people clean for their health.

Harris Research Inc., the parent company of carpet and upholstery cleaning franchise Chem-Dry, conducted the independent national survey to determine the motivations behind cleaning habits and the importance of healthy home environments for families. The survey included nearly 700 participants, both men and women, ranging in age from 18-55 across various income levels around the country.

While appearance of the home and peace of mind were the two top cleaning motivators among all respondents, health reasons topped the list for women ages 25-34. Among that group, more than 30 percent reported “health of their family” and eliminating unhealthy elements such as bacteria and

allergens as the top motivators.

While 38 percent of people feel the air inside their homes is cleaner than outside, 46 percent feel that indoor elements like dust, pet dander and mold are major triggers for asthma and allergy attacks.

Respondents reported allergies

are a year-round occurrence but spring was ranked by the largest portion of people – 31 percent – as the time of year when allergies and asthma most act up.

Eight out of 10 respondents believe home cleaning is one way to effectively remove allergens and alle-



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viate symptoms and when asked what part of the home they focus on most to remove allergens, the top response was the flooring – carpets, rugs, tile and other flooring.



## ●●● financial services College students acing money management

Wise beyond their years?

Conventional wisdom says young people have a lot to learn when it comes to managing money but the reality is most American college students are handling their finances carefully and conscientiously, according to *Majoring in Money: How American College Students Manage Their Finances*, a new national study from college-funding company Sallie Mae and researcher Ipsos.

The study compiles the results of online interviews of 800 college students between the ages of 18 and 24 and reveals students are taking the right steps when it comes to managing money. More than three-fourths (77 percent) of college students pay bills on time; six in 10 (60 percent) never spend more money than they have available. In addition, college students are putting money aside each month. More than half (55 percent) save at least some

money every month and 24 percent report having an emergency fund.

While most college students make purchases with debit cards (85 percent), cash (86 percent) and mobile payments (77 percent), more than half – 56 percent – have at least one credit card. In fact, roughly six in 10 (59 percent) report their primary reason for getting a credit card was to build their credit history. The study also finds that the majority of students with credit cards are using them responsibly and paying the bill themselves. Specifically, 63 percent pay the balance in full each month and 73 percent pay the bill without assistance from a parent or other adult. Roughly seven in 10 (69 percent) report an average monthly balance of \$500 or less.

“Having a credit card doesn’t necessarily mean students are overspending,” says Julia Clark, senior vice president, Ipsos Public Affairs. “The reality is they are demonstrating sound reasoning and thoughtful decision-making and they are managing their payments effectively.”

The research shows that most college students understand the value of good credit and the majority know how to get and maintain it. Nine in 10 college students (91 percent) know having a good credit record can help them qualify for different types of credit and improve their access to favorable interest rates. The majority know paying bills on time (93 percent) and keeping credit balances low (63 percent) are positive credit behaviors and opening multiple credit accounts simultaneously (64 percent) and using as much credit as possible (61 percent) are negative credit behaviors.

While the majority of college students express confidence in their current money management skills, 83 percent would like to learn more, especially about saving and budgeting. College students would also benefit from additional education around specific credit topics, including how interest accumulates and how repayment behavior and credit terms affect the cost

of credit over time. In fact, when asked to answer multiple-choice questions on those topics, only 31 percent answered all three questions correctly.



## ●●● retailing research Study finds blurring of retail categories

Buying groceries at a non-grocery store

As reported by *Progressive Grocer*, the third annual Consumer Insights research survey conducted by retail design firm King Retail Solutions (KRS), in collaboration with A.R.E.|POPPI, highlights the continued evolution of category blurring across retail channels.

The survey sampled over 1,200 diverse U.S. residents including Millennials, Gen Xers and Baby Boomers about their shopping habits and attitudes toward a multitude of retail sources. With three years of data available, the 2016 study focuses on year-over-year analysis, new trends and ongoing shifts in consumer preferences.

Once again, the 2016 survey dives into the growing trend of category blurring. Quality and selection continue to increase in importance for purchases of fresh meals, groceries and apparel. A new area of attention for the 2016 research study focused on special-occasion purchases highlighted as a growing

trend for a wide variety of retailers.

Study highlights include:

**Online for in-store pickup:** 54 percent of U.S. shoppers find the option to buy merchandise online for in-store pickup appealing and have done so in the past 12 months. That's up 14 percent from 2015 responses. Thirty-four percent said they would purchase groceries online for in-store pickup. Forty percent of men would buy groceries online for in-store pickup while only 29 percent of women would do so; 47 percent of Millennials, 33 percent of Gen X and 21 percent of Baby Boomers would buy groceries online for in-store pickup.

**Grocery category-blurring:** 65 percent of U.S. shoppers bought groceries from a non-grocery store in the preceding 12 months and 91 percent would consider doing so in the coming 12 months. As income increases, so does the likelihood of having purchased groceries from a non-grocery store. Canned/boxed foods are the grocery category most likely to have been purchased from a non-grocery store. Big-box stores and dollar stores are the non-grocery retailer types consumers are looking to most frequently for their grocery purchases.

Whether at a grocery store or another type of retailer, KRS consumer panelists ranked their decision-making factors in choosing where to purchase groceries as follows: cost; quality; selection; convenience; the shopping environment/experience; and access to non-grocery items also sold.

Aside from restaurants, grocery stores are the most popular outlet consumers are turning to most frequently for their fresh prepared meal purchases. Kroger, Albertsons/Safeway, Publix and Ahold were the top grocery store brands ranked for fresh prepared meal purchases among KRS study participants.

**Special-occasion category-blurring:** Big-box (51 percent), dollar stores (47 percent) and grocery stores (40 percent) are the most popular outlets KRS survey panelists turn to most

frequently for their special-occasion purchases. Kroger, Albertsons/Safeway and Ahold were the top grocery store brands ranked for special-occasion purchases, including flowers, balloons, gift wrap and greeting cards.

**Retail subscription services:** 28 percent of U.S. shoppers have participated in an ongoing subscription retail purchasing agreement in the past 12 months – up 6 percent from 2015 responses. In terms of grocery, the No. 1 retailer mentioned among subscribers is Amazon, whose pantry penetration is rising as a competitor to traditional grocery stores. Other retailers offering grocery items by subscription include: Target, Walmart, Graze and Naturebox.



## ●●● wearables research Consumers confused yet intrigued by wearables

### A good kind of nerdy

A nationwide survey of 1,060 American consumers conducted by Cincinnati-based loyalty firm Colloquy shows that 63 percent say wearable devices are too expensive. Just over one out of every two Americans, 52 percent, say they don't know enough about wearables and don't understand them. On the other hand, 35 percent of consumers said wearable technology is nerdy but

“cool nerdy.” In a stat that retailers undoubtedly will embrace, one in four Americans, 27 percent, said they “used to hate shopping but with my wearable I love it.” And just 8 percent said wearable devices are uncomfortable.

Wearables consist of clothing or accessories that integrate technology into consumers' everyday lives in fun and practical ways. Whether it's fitness trackers, eyewear, smart jewelry, a dress that posts to social networks or shorts that upload workout stats, it's fair to say that Americans are still shopping. They are guessing whether prices will go down and wondering if they're ahead of, or behind, the fashion curve. They're still doing their research. And some are concerned about age appropriateness.

Key wearable variables: 33 percent said wearables make a fashion-forward statement; 41 percent said “I'd be more likely to place a wearable on my pet than on myself”; 36 percent said wearables are a passing fad; 58 percent said “I'd like to use a wearable device but I'm too old”; and 35 percent said people who use wearable devices are just trying to show off.

“Wearables work on several levels for retailers. Keep it fun. Keep it dynamic and court the mighty Millennials,” Colloquy Research Director Jeff Berry says. “Retailers should consider sending one-to-one, targeted offers to shoppers' wearable devices, including on-the-fly pricing adjustments based on inventory and even time of day.”

Additional survey results show that consumers registered only modest concerns about the functionality of wearables: 9 percent said wearable devices have to be charged too often; 6 percent said wearables are not compatible with other devices; and 4 percent said wearables have slower processing times than other devices.

The Colloquy survey results are based on an online survey taken in February 2016 of 1,060 American consumers. The margin of error is +/- 4 percent at the 95 percent confidence level.

# Q

## IN FOCUS

### Product and Service Update

••• telephone research  
**Software addresses new dialing regulations**

#### TCPA in the USA

Montreal survey software firm Voxco has released TCPA Connect, a manual-dialing software that helps U.S. phone survey centers better address the new Telephone Consumer Protection Act (TCPA) dialing regulations that prohibit the use of an autodialer when calling U.S. cellphones without express prior consent from the respondent. The TCPA Connect solution allows researchers to regain lost productivity by letting interviewers use the integrated Voxco software to manually dial calls directly from the survey platform. The solution offers four distinct manual-dialing deployment options that are variable based on each phone survey center's situation, which can vary based on data storage needs and the variety of respondent situations. Voxco has a technical overview document available via the TCPA Connect page on its Web site that highlights the benefits of each of the four deployment scenarios and their advantages over detached-phone dialing. [www.voxco.com](http://www.voxco.com)



[quirks.com/articles/2016/20160604.aspx](http://quirks.com/articles/2016/20160604.aspx)

••• new product research  
**NPD service measures a product feature's value**

#### How much is that new wrinkle worth?

The NPD Group, a Port Washington, N.Y., research firm, has introduced a new approach for identifying the value in dollars of individual product features, allowing manufacturers to make more informed product development and marketing decisions. The approach leverages NPD's data assets, including point-of-sale information from more than 700 retailers nationwide. NPD data show what consumers purchased, the price they paid for those products and a variety of other attributes. Through analysis of the store-level data that is representative of the entire market, NPD can determine the value in dollars of the individual features of those products, allowing the firm to help address and answer the broad range of questions that arise as manufacturers develop and take to market new and enhanced products. Retailers can also use the service to identify must-have product features they need to carry, to support category-level decisions on how to price and assort products within stores and to understand people's needs and preferences and how they evolve.

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

••• IT research  
**Illuminas debuts IT exec community**

#### Includes CIOs, CTOs and others

Austin, Texas, research firm Illuminas has launched the Illuminas Insight Exchange, a new research-oriented community of IT executives, including CIOs, CTOs and other senior technology officers from enterprises in the U.S. Every community member is specially recruited and vetted to guarantee their knowledge and expertise in the technology market. At launch, the community will include 100 members. The community is designed to increase a marketer's or researcher's ability to reach and understand IT decision makers. Built on icanmakeitbetter's research platform, Illuminas can deploy a research activity and have insights available in a few days. It allows for a range of qualitative and quantitative research activities, including surveys, discussion boards, focus groups/chat sessions and diary activities, with real-time and custom reporting options.

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

••• b2b research  
**Millward Brown offers B2B ad tool**

#### Can benchmark ads against competitors

New York-based research consultancy Millward Brown has launched Link for Business, a version of its advertising copy-testing solution Link for B2B marketers. The solution allows B2B marketers to assess the performance

of advertising in any medium, in any market against brand and sales objectives. The solution predicts the impact of advertising on a business' brand and likely sales, providing clients with insights about their advertising that B2B marketers can use to optimize creative content and maximize return on marketing investment. Link for Business studies can be completed with any business-to-business audience and will benchmark ads against comparable or competitor creatives. The solution is available globally and is delivered by Millward Brown's Corporate Practice, the company's specialist business-to-business research practice.

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

## ●●● automated research

### Research Now offers templated studies

Concept test, brand health, A&U

P plano, Texas, firm Research Now has launched Research Now Marketplace automated research, a family of templated studies addressing common research topics. The studies are targeted toward researchers looking for a tech-enabled solution to execute their routine studies while maintaining data collection standards. Research Now Marketplace automated research is launching with seven initial studies including concept test, brand health, attitude and usage, creative test, share-of-wallet, customer satisfaction and employee culture. Additional study types are in development and will be added at staged releases. The studies may be initiated through an online form and are generally completed within a few business days. Results are delivered in real-time via an online dashboard and users can filter and download the data. Every project is reviewed and monitored by a professional market researcher. Research Now Marketplace automated research is immediately available in the U.S., Canada and Europe and will be available in APAC later this year.

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

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

## ●●● telephone research

### Survox xLOG tracks phone-dialing activity

Helps call centers defend against legal claims

S an Francisco phone survey automation firm Survox has introduced Survox xLOG, a searchable archive of all phone-dialing activity and operational methods. Call centers can use xLOG to support inquiries and defend against legal claims of wrongful operations stemming from the 1991 Telephone Consumer Protection Act, which prohibits the use of automatic telephone dialing systems to call cell phones without the recipient's prior express consent. Survox xLOG archives calling records, protects them from modification and makes the data easily accessible through a simplified search tool. It also enables call centers to produce a report documenting whether a specific number was ever called, when it was called and what dialing method was used.

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

## ●●● Briefly

■ Wilton, Conn., researcher Toluna has fused its QuickSurveys DIY Survey and Analytics Platform with the Toluna.com survey community, allowing users to receive over 1,000 nationally-representative survey responses in 21 countries, including the U.S., Canada, Brazil, Mexico, the U.K., France, Germany, Italy, the Netherlands, Poland, Spain, Russia, Australia, India, Singapore, Indonesia, China, Japan, Malaysia, Thailand and South Korea. All projects are completed within a few hours to less than a day.

[us.toluna.com](http://us.toluna.com)

■ Interactive Video Productions, a Morganville, N.J., mobile research labs provider, has launched MobiLAB ET Online, allowing marketing research respondents to participate in eye-tracking research from anywhere they have a Web cam and the Internet. Researchers can measure what people engage with,

for how long they engage and the order in which they engage. It also comes with a Web portal, providing a platform for stimuli presentation, recording, visualization and analysis of the remote eye-tracking. Powered by Sticky, the platform includes visualizations with view gaze data over stimulus as static data or as moving data (over time).

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

■ PTG, a Tenafly, N.J., firm that offers consumer engagement and non-conscious measurement techniques, has introduced a new research technology that passively and simultaneously measures consumer behavior, engagement and emotion in real-time. As a result, marketers can obtain shopper insights data that integrates the following four behavioral and emotional measurement approaches: Will shoppers stop to consider your product? How much time will consumers spend on your brand versus the competition? Are shoppers engaged with your packaging, display and/or POS? What is the emotional reaction to the shopping experience? [pretesting.com](http://pretesting.com)

■ The Association for Retail Technology Standards (ARTS), part of The National Retail Federation's Technology Leadership Community, has released new resources to help retailers safeguard their data. The three new security programs designed by ARTS for retailers include: ARTS Cybersecurity Primer, a paper that provides an outline and guidance on what developers and architects should be wary of in areas of relevant risks, as well as topic areas for further research related to common best practices and management strategies; ARTS Data Privacy Primer, which provides a base for architects and product managers to recognize what data is classified as sensitive and what the risk is; and ARTS Data Classification Template, which provides a basis for retailers to begin developing their own data classification models without having to start from scratch. Both primers and the data classification template are now available for download on NRF.com.

■ Canada-based firm Cido Research has expanded its use of survey technologies

provided by Montreal-based survey software provider Voxco to include Voxco Panel Manager and Voxco Online to meet its requirements for online survey data collection. This expands Cido's existing Voxco usage into a multi-channel software platform. [www.cidoresearch.com](http://www.cidoresearch.com)

■ Palo Alto, Calif., online survey platform SurveyMonkey has launched SurveyMonkey Intelligence, a mobile app insights platform that expands the company's existing data businesses, offering data and insights on mobile apps and the overall app economy to customers. The new platform will allow publishers to benchmark key metrics, track competitors, improve due diligence and discover emerging mobile trends. SurveyMonkey Intelligence was created through the acquisition and incubation of mobile start-up Renzu, co-founded by Abhinav Agrawal, Arjun Lall and Jason Tomlinson, all alumni of social game developer Zynga. [www.surveymonkey.com](http://www.surveymonkey.com)

■ U.K. research agency DJS Research Ltd has been appointed on to a new framework, the U.K. SBS BIS Research and Evaluation Framework. Following an invitation to tender, the firm submitted a proposal to the Department for Business, Innovation and Skills (BIS), which was ultimately successful. The BIS is a ministerial department for economic growth, which invests in education and skills to promote trade, boost innovation and help individuals start and grow a company. BIS also works to reduce the impact of regulation and protect its consumers. DJS Research has previously worked for the Department for Business, Innovation and Skills on a market research project about consumer rights legislation. [www.djsresearch.co.uk](http://www.djsresearch.co.uk)

■ Nielsen, New York, has launched the Nielsen Marketing Cloud, which integrates consumer and media data with marketing activation and analytics applications into a single platform and allows clients to deliver relevant marketing to their customers across multiple platforms. The Marketing Cloud's core set of applications in-

clude the Nielsen Data Management Platform and DaaS, Multi-Touch Attribution and In-Flight Analytics for Automotive, CPG and Retail, as well as integrations with over 150 third-party media and content activation and optimization applications. All applications enable cross-platform analysis and centralized data access. Additional Nielsen and third-party applications, including Nielsen Media Impact for cross-platform media planning, will be integrated in the coming months. [www.nielsen.com](http://www.nielsen.com)

■ Facebook, Menlo Park, Calif., will offer its publishing partners Digital Content Ratings – part of New York-based Nielsen's Total Audience Measurement framework – for measurement of its Instant Articles. Facebook is opening the Instant Articles program to all publishers, including the collaboration with Nielsen for Instant Articles measurement. Digital Content Ratings provides daily measurement of audiences across all digital content types and platforms, with metrics fully comparable to television. The initial release currently in the market includes measurement of static and video content, spanning desktop, mobile phones and tablets. Measurement of audio content and audiences viewing on game consoles and over-the-top devices will be available in a future release. Publishers that participate in Facebook's Instant Articles program will be eligible to have Digital Content Ratings measurement for the article contribute to their total audience, including industry metrics such as audience, page views and time spent. Nielsen will also offer measurement of Facebook's Instant Articles to all Digital Content Ratings subscribers as part of its standard service. Currently, more than 25 Nielsen clients are evaluating their Digital Content Ratings data for video measurement, with another 15+ evaluating for measurement of static content. Many others are on the path toward implementation. The syndicated release of Digital Content Ratings will be introduced to the market in phases beginning in Q2 2016. [www.nielsen.com](http://www.nielsen.com)

■ Bridg, a Los Angeles marketing software company that provides marketing and business intelligence to restaurant brands, has launched Reveal, a free, marketing-focused customer analysis tool that provides select new and potential clients with customized customer data analysis. The intelligence available through Reveal allows restaurant companies to identify and segment customers and track key behaviors, such as visit frequency patterns and spend per visit, which can be used to create personalized marketing campaigns to drive transactions and frequency and improve consumer loyalty.

■ Irvine, Calif., firm MFour Mobile Research has introduced MFourDIY, an all-mobile, do-it-yourself survey platform. The features include: fast turnaround times; real-time data; instant editing functions to change specs and options and revise questions; GeoValidation, which verifies when a panelist enters a retail location, then pushes a relevant survey; multimedia capability allowing clients to prompt respondents to take pictures or make and send audio/video files; heat map imagery; a cost tracker; and a help center staffed by in-house MFour representatives. [mfour.com](http://mfour.com)

■ Maritz Motivation Solutions, St. Louis, has launched Awards Aviator, a new interactive virtual reality game experience for reward and incentive programs. Developed by Maritz product and interactive creative designers, Awards Aviator uses Oculus Rift headsets, which were introduced to consumers in April. During the two-minute game, players earn award points by capturing gems while navigating their spaceship through a nocturnal planetary landscape. Wearing the Oculus glasses, players turn their heads left or right or tilt up or down to navigate the ship. The total score is tallied at the end of the game and includes a top 10 list of the best "aviators" in the galaxy. Maritz estimates that 15 people an hour can play the game, which is designed to appeal to a wide variety of audience demographics. Maritz provides the game hardware and software and a

company operator assists companies to deploy it at their desired location.  
[www.maritzmotivation.com](http://www.maritzmotivation.com)

■ New York-based researcher Millward Brown and Kantar Worldpanel, London, have formed a partnership in the U.K. to provide a new solution that allows brands to simultaneously evaluate both brand and sales performance delivered by their digital marketing campaigns. The partnership includes Millward Brown's Brand Lift Insights solution and introduces Sales Insights, a new joint offer from the two organizations. Brand Lift Insights identifies differences in brand attitudes from awareness through to purchase intent that can be attributed solely to digital marketing campaigns. Sales Insights applies the same control-exposed methodological approach to Kantar Worldpanel's continuous sales panel, allowing sales uplifts to be calculated. As a result, brands can take greater control of their digital spend and understand effectiveness across brand and sales metrics. The new service will be available via Millward Brown and will initially roll out in the U.K. In parallel, Kantar Worldpanel will continue to offer Consumer Mix Model, which evaluates how all elements of the marketing mix (digital and non-digital) work both together and individually by analyzing their impact on purchasing behavior before, during and after the campaign.  
[www.millwardbrown.com](http://www.millwardbrown.com)  
[www.kantarworldpanel.com/global](http://www.kantarworldpanel.com/global)

■ Chicago researcher IRI has launched E-Market Insights, its proprietary e-commerce measurement and tracking service and the fourth integrated component in the firm's e-commerce solution suite. The service, along with IRI's OmniChannel Shopper Behavior Insights, Digital Path-to-Purchase and E-ShopperLink consumer segmentation, provides components to improve understanding of online shopping and shopper trends for CPG manufacturers and retailers. E-Market Insights leverages an integrated e-commerce data set and an ecosystem of partners, such as comScore and Return Path. It also includes IRI methodologies and


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

monitors brand performance in the e-commerce channel, providing visibility across sales, growth, share and trends.  
[www.iriworldwide.com](http://www.iriworldwide.com)

■ Alter Agents, a Los Angeles research firm, has released a new e-book called *Dawn of the Promiscuous Shopper*. The new publication uses data from the firm's Shopper STAT technology and examines the changes in the way consumers interact with brands. Shopper STAT is a tool that draws data from

continuous sampling of shoppers who bought groceries in the last 24 hours.  
[www.alteragents.com](http://www.alteragents.com)

■ Port Washington, N.Y., researcher The NPD Group has launched its new Diamond Tracker service, which provides the diamond industry with retail measurement of diamond sales in the fine jewelry market. The service also provides detailed diamond market data to help clients analyze key market trends at granular levels.  
[www.npd.com](http://www.npd.com)



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# Are smartphone users less-engaged survey-takers?

| By Philip Derham



## snapshot

Philip Derham reports on research on research pertaining to survey dropout rates by device.

Online surveys should be easy to do. You do them when you want and where you want to do them. They are not dinnertime interruptions, nor are they foot-in-the-door interviewers, calling when you would rather be doing something else.

But a recent analysis of 14,111 recent Derham Marketing Research online survey participants across Australia found that while four in five participants who started their online surveys completed them, one in five dropped out partway through. Completion incentives were provided, the surveys averaged 15 minutes, were written to be as involving and interesting – given the topics – and all had skips, so only relevant questions were asked. All surveys were optimized for completion on personal computers, laptops, tablets and smartphones.

The online survey software records what devices people use to start their online surveys, so we first looked at the devices used, to see if those provided indications of why people dropped out of the online surveys. The rise in use of smartphones in Australia, as elsewhere, and of their utility, was a particular interest.

Most participants used desktops or laptops (79 percent) to start the surveys. Few used tablets (9 percent) or smartphones (12 percent) but the starting and completion rates differed markedly by device, as Figure 1 shows. Smartphone users were far more likely to start and stop than were desktop or laptop participants. Tablet users fell between the two.

Seeing the results led us to ask why smartphone users started but dropped more than desktop or laptop online survey starters, particularly as the surveys were designed expressly for smartphone use as well.

The time the Australian respondents took to do the surveys was a possible reason for the differences.

On average, across all devices, the surveys took 15 minutes each to complete (dropouts ignored). This all-devices average time was the same average time as those who used desktops to complete the survey. Those who used tablets took a little longer to complete their survey – 16 minutes or 7 percent longer. Those who used smartphones took 18 minutes on average to complete their surveys – 17 percent longer than average, and a noticeable difference from the all-devices average, indicating online surveys are harder to complete on a smartphone than on other devices.

Seeing this data, some suggested smartphone screens were too small; or were difficult to use in online surveys; or smartphones were used in time-pressure situations; or that surveys on smartphones were interrupted to take phone calls or to read incoming SMS; that PCs, laptops or tablets were easier to use; or could be used at work. But these hypotheses were not knowledge.

## Test several hypotheses

We were able to test several online survey hypotheses in an Australian pilot survey ostensibly about chocolate bars, vacations and supermarkets. At the end of the survey, we asked



[quirks.com/articles/2016/20160605.aspx](http://quirks.com/articles/2016/20160605.aspx)



*“The reports of my death are greatly exaggerated.”*

**Telephone data collection isn't  
dead;  
it's just changed.**

**And we're on top of it.**

**100% Compliant...** with all TCPA & FCC cell phone rules.

**Intelligent...** projects handled by experienced researchers, not 'project managers'.

**Independent...** not owned by a conglomerate or one of your competitors.

**Trusted...** for over 40 years.

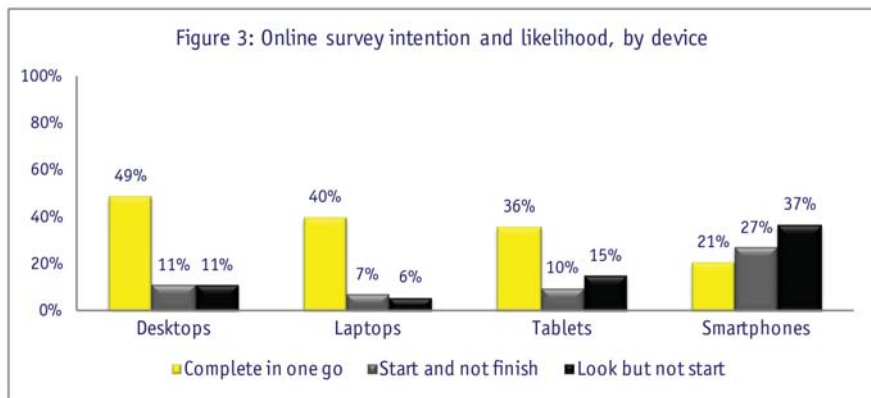
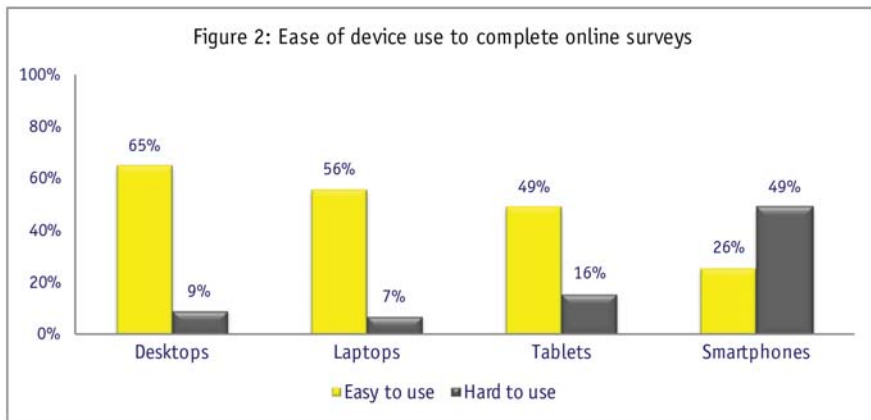
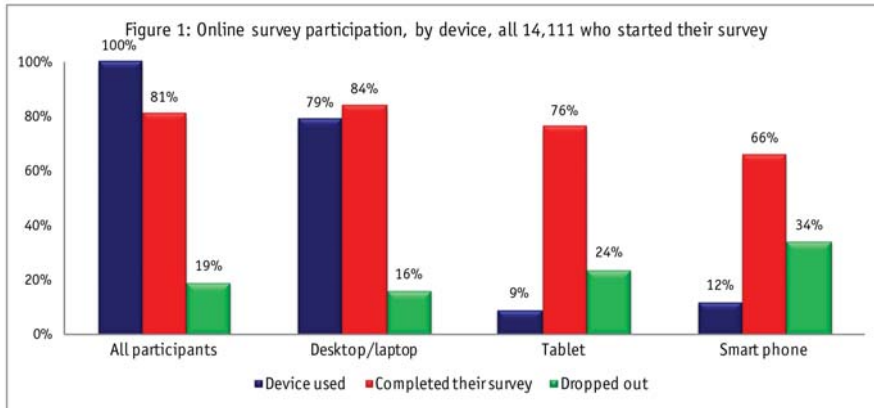
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(almost worse!) look but not start. In comparison, only one in 10 desktop, laptop or tablet users would look and not start or look, start and not finish the online survey (Figure 3). Desktop, laptop and tablet users were more likely to expect that they would start and complete an online survey in one go.

Some sample comments included:

“I only look at my e-mails and look at surveys between sessions, when waiting for clients to arrive. If I can't do it in 5 minutes, or the client arrives, I stop.” -- Robin, counselor

“Do it on the way to work in the train and often lose contact when we go in the loop and don't bother starting again.” -- Simon, public servant

“Do you know how small my Galaxy Ace screen is and how big fingers are?” -- Russell, builder


“Always do surveys at work – one way at getting back at the boss!” --

Anonymous, occupation not stated

“Like anything, is so much easier using the right tools – and my desktop and keyboard are the right tools for any Internet activity.” -- Ted, retired

### Less engaged

Key takeaways from the original data analysis and from the Australian pilot study are that smartphone users are less engaged with online survey invitations, take longer to complete online surveys and, if they start, are more likely to drop out partway through. And what was identified by desk research with past survey findings is borne out by the pilot survey participants' attitudes to completing surveys on smartphones.

Given the ubiquity of smartphones across Australia, the gradual diminution of desktop PC use and the increasing interchangeability of laptops and tablets, these results suggest there is a need to understand how to better engage with smartphone users in online surveys. 

Philip Derham is director of Australia-based Derham Marketing Research. He can be reached at [derhamp@derhamresearch.com.au](mailto:derhamp@derhamresearch.com.au).

about the survey itself and about preferences for devices that can be used to complete online surveys.

The sample was drawn from an online panel provider's database and the sample and responses were from a predominantly female (72 percent) and middle-aged (30 to 59 years – 58 percent) audience. These results are thus indicative and further more extensive research across Australia is planned.

Having identified that smartphone users were more likely to drop out of online surveys than were users of other devices, the pilot survey

sought to understand attitudes to device use, as these may influence online survey completions.

As Figure 2 shows, smartphones were seen to be the most difficult devices to use to complete online surveys and desktops and laptops were seen to be easiest.

And to emphasize the negative attitudes to using smartphones for online surveys, two-thirds of the participants said that if they were to be invited to do an online survey on a smartphone, they would be likely to start and not finish or

# Leveraging Artificial Intelligence for Colgate-Palmolive's Early Research

By Joey Lu, *Technology Insights, Consumer & Market Insights, Colgate-Palmolive*



Oral health is important to a person's overall health and well-being. At Colgate-Palmolive, scientists in our Early Research group are committed to developing meaningful technology to address oral problems or enhance oral health. Recently, our scientists have discovered a technology which has great potential to treat several problems in the mouth. However, there was very little known to us about the demographics and life habits of the people prone to these problems as well as on the prevalence and frequency of the problems. In addition, they needed to consider if there was a sizable market opportunity to further the scientific research in this area, what products or home remedies people currently using and what products are our customers seeking?

With so many questions and so little knowledge to build upon, Early Research turned to Technology Insights for help. Technology Insights, the function leading consumer and product understanding at Colgate-Palmolive Global Technology

Center, assisted in defining the scope, objectives and deliverables of this exciting and challenging research. Various methodologies in the marketplace were investigated – omnibus, online consumer communities of both large and small scale, and one-on-one interviews – as well as a hybrid combination of all of these approaches. The conclusion: traditional methods for collecting qualitative and quantitative results would not effectively address the research goal.

Technology Insights was intrigued by Quester's artificial intelligence capability that combines quantitative and qualitative with quantitative sample sizes, and it was decided to brief them on this exploratory research. Quester's team brainstormed and designed the approach that fits the research scope and efficiently delivered the research objectives both qualitatively and quantitatively.

Utilizing the artificial intelligence based moderator in the research, respondents were engaged in one-on-one conversations that led to rich

responses across the nation-wide sample. The results were delivered quickly and cost effectively. The survey was engaging and the quality of the results was powerful, helping to identify the targeted consumers, the habit predictors of oral problems, current products or home remedies, and exciting product ideas for both preventative and cure pathways.

Acknowledgement: This research was funded by Early Research Group at Colgate-Palmolive Company

## About Quester:

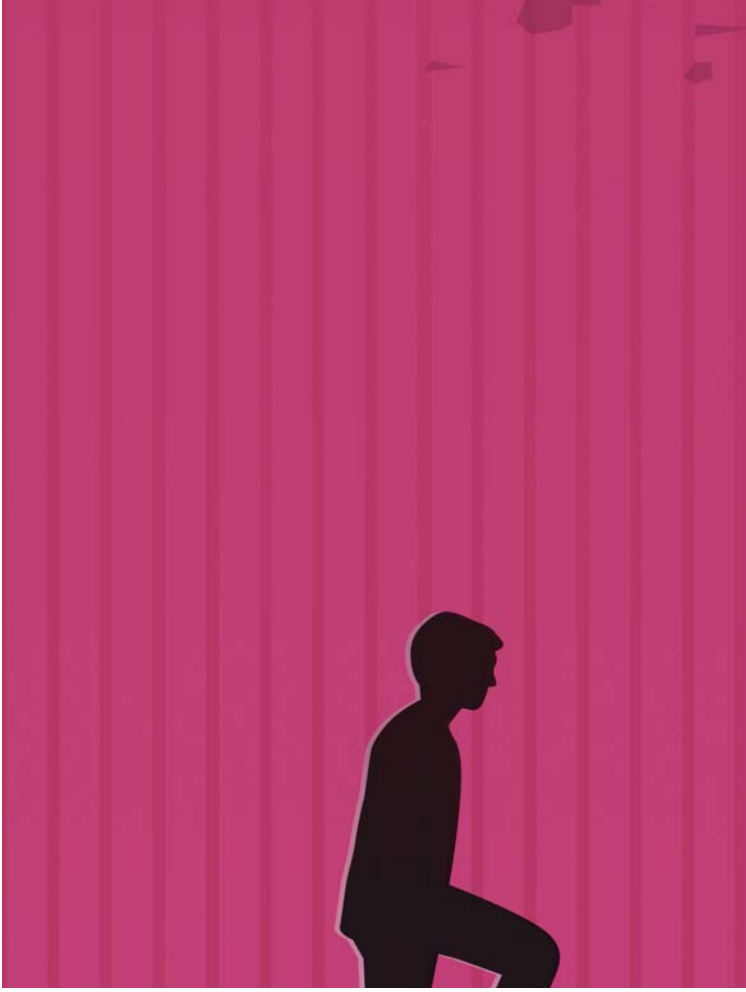
Quester is a consumer intelligence company that specializes in harnessing the power of conversation. Quester's conversational architects leverage an award winning artificial intelligence moderator to develop one-on-one conversations, blending qualitative and quantitative into a single phase, conducted at scale. Marketing scientists and linguistic analysis collaborate to produce a comprehensive analysis that goes beyond data to bring a full and complete story to life. ♦

●●● research technology

# Do we have a problem with innovation?

Highlights from the FocusVision 2015 Annual MR Technology Report

| By Sheila Wilson and Tim Macer



## snapshot

This installment of the long-running study of tech in MR found research companies wondering about their own – and the industry’s – response to the need to innovate.

Technology is continuing to transform the market research landscape, with data collection modes on the point of a very surprising switch for second place after online. Yet it appears MR has something of an innovation problem, especially over technology. These are some of the contradictory messages to emerge from the FocusVision 2015 Annual MR Technology Report by our firm, London-based meaning.

For 12 years now, we have been testing the temperature of technology as used across market research in our annual technology survey. We interview just over 200 research companies of all sizes around the world each year (206 in 2015), using a 12-15-minute online interview among those responsible for, or influential in, the technology directions of their research company.

For 2015, we focused on the research industry’s relationship with innovation, attitudes and experiences around blending qualitative and quantitative research and we also revisited what is happening with communities. We also asked our usual tracking questions about modes channels and technology choices being made across the industry. Here, we present some of the highlights in our exclusive annual review on the report for Quirk’s.

### Mobile is trending and so is CAPI

Every year, we ask our participants to consider what proportion of their quantitative work they attributed to each mode. In Figure 1, we show the major modes and also self-completion on mobile devices (not including SMS research), which looks like it is becoming a major mode.

Back in 2006, while Web was already ahead, CATI and paper between them still accounted for almost half of the volume of work. Less than a decade later, Web dominates, while CATI and paper are fading into obscurity and CAPI looks set to overtake CATI in volume very soon. Mobile self-completion has grown from barely anything to nearly 5 percent in in the last six years.



[quirks.com/articles/2016/20160606.aspx](http://quirks.com/articles/2016/20160606.aspx)



al online surveys on mobile devices.

The message for market researchers and software developers alike is that mobile, with all its challenges, is now defining the direction of travel in data collection.

### The complex weave of distribution methods

We have been asking MR companies what proportion of projects involves each of the main distribution methods since 2006. The one constant over time is PowerPoint's stranglehold, while other methods continue to jockey for a position in the mix (Figure 2). With so much research today being delivered without necessarily culminating in a debrief before an actual audience, we have long questioned whether PowerPoint deserves to be the industry's de facto standard for communicating research findings to decision-makers.

Just as technology is transforming data collection, at this point we would like to report to you that companies are also shifting towards high-tech delivery methods. Interactive analysis and digital dashboards can deliver insights in ways that are more engaging, more actionable and more embedded into the research buyer's own business. But in fact, they are not showing clear signs of taking off – although we have detected evidence since 2012 that larger companies are increasingly likely to use them.

Perhaps this will change. In another question, we ask what type of new technology research companies are looking to buy in the coming year. What comes out on top are report-publishing and delivery software.

### Communities find their niche

Having explored online research communities in 2009, when they were still in their infancy, and then again in 2012, we wanted to see how they were doing in 2015.

The results show communities are now well-established in around a quarter of research companies. Only 17 percent of companies were operating at least one in 2009 and in 2012 this was unchanged at 16 percent. Three years on, it has now reached 24 percent; 41 percent of larger firms and 16 percent of smaller firms. But 18 percent of smaller firms say they are planning to introduce one. The number is also higher in the Asia-Pacific region: 32 percent run them, against 24 percent in North America and 22 percent in Europe.

The actual number of communities being run has also grown (Figure 3). In 2009 only 6 percent of companies had more than one: that has now

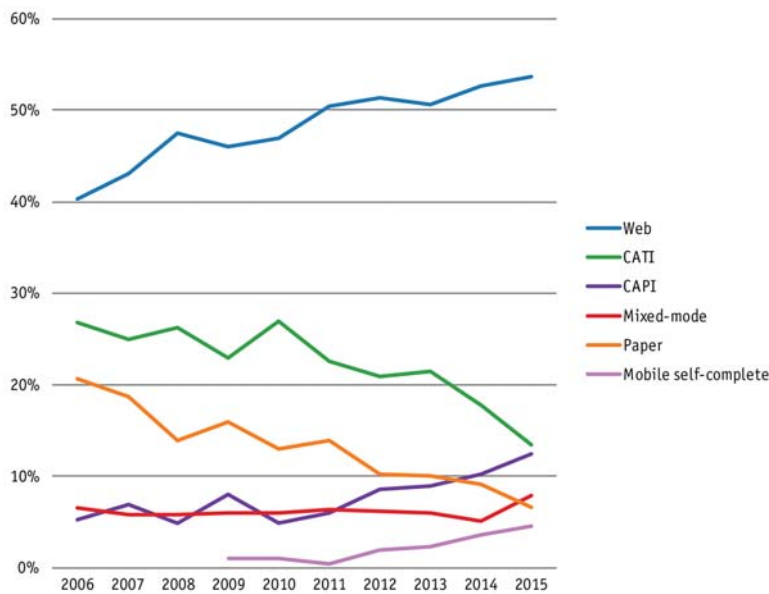


Figure 1: Approximate proportion of work represented by each interviewing mode or combination of modes.

It is mobile technology, both tablet and smartphone, that is driving growth not just in mobile self-completion but CAPI too. Consumer tablets with built-in data communications have transformed the economics of switching face-to-face interviewing projects from paper to CAPI. As for CATI, it now seems that market research companies are at last moving through the complex process of divesting themselves of their CATI operations and the pain of switching CATI trackers to Web. In another question, we also observe continued rapid growth in participants taking convention-

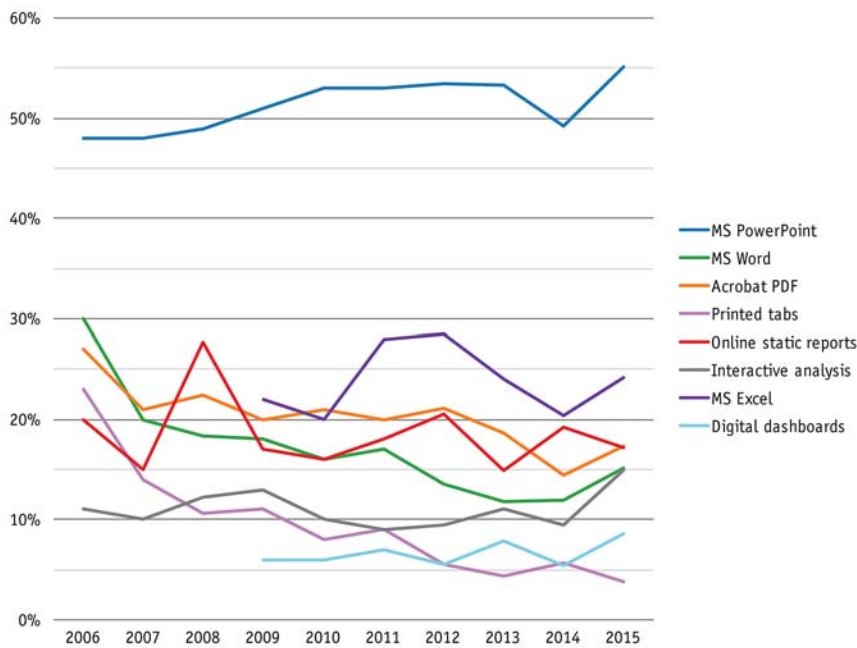


Figure 2: Percentage of projects involving these deliverables or distribution methods to the client.

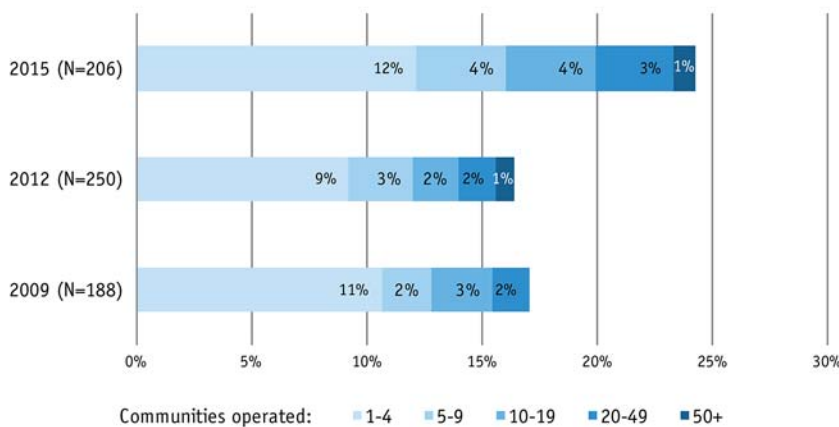


Figure 3: The number of research communities being run.

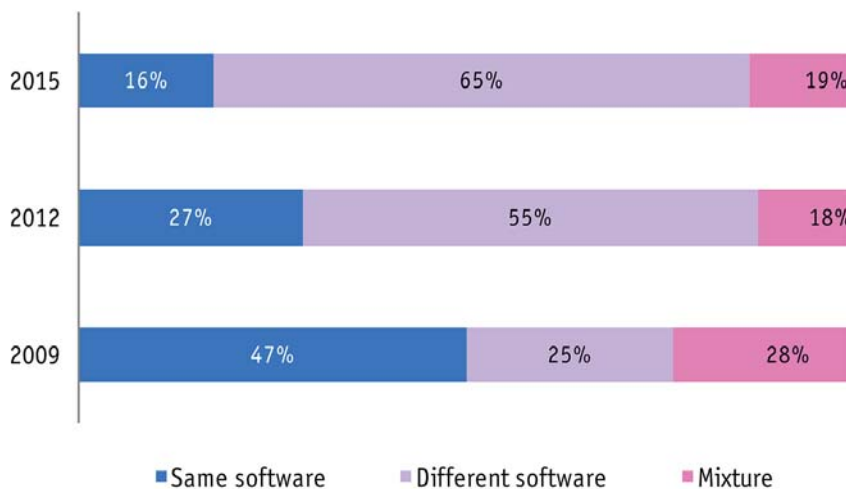


Figure 4: Type of software used to operate communities.

doubled to 12 percent but it's still rare to find anyone operating more than a handful. Just 8 percent have more than 10 and only 4 percent have more than 20.

In 2009, most companies were making do with their panel software to run communities. At that time, there was little else on the market. Now, most firms are using entirely different software from their panel software (Figure 4).

In further questions (not shown here) we asked about the software capabilities operators need to run their communities and how well these requirements are met. These too show considerable improvement across the board since 2012, though support is judged not as good as needed for several key features, including mobile apps for community members, co-creation tools, real-time focus groups and, with the lowest rating, text analytics.

### The benefits of blending qual and quant

This year, for the first time, we asked some questions about blending qualitative and quantitative research. In the question in Figure 5, we asked what advantages companies saw in mixing qual with quant.

At a time when clients are demanding more from their research spend – and especially for it to have more impact on their business – it is encouraging that our participants are of the view that blended research offers a good way to achieve this. The top three benefits cited all check those boxes. Cost and efficiency benefits are less easily realized, it seems.

In the answers to other questions, four out of five companies said it was either “essential” or “moderately important” to be able to provide blended qual and quant research and more than twice as many firms said it was “easy” rather than “difficult” to do some blended research with the technology they use. This surprised us, since most software on the market is predominantly qual or quant in its approach.

In addition, participants were asked how many quantitative projects incorporated some qualitative elements and vice versa (Figure 6). These show that blending qual and quant is widespread, though there are variations by region

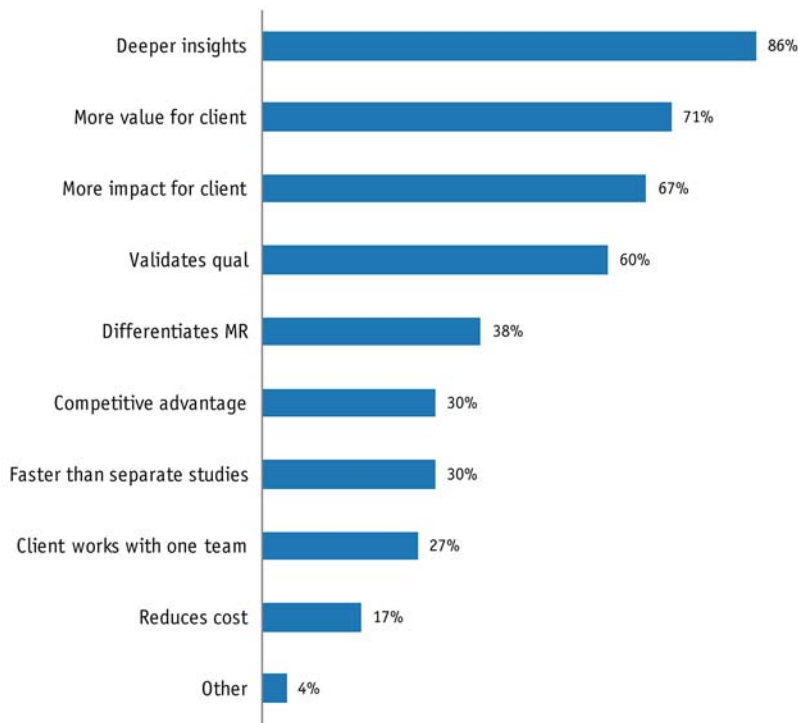


Figure 5: The advantages of blended research.

and company size. It is also clear that qual elements are more likely to be injected into to a quant intervention

rather than the other way around.

However, this overview ignores around a quarter of the sample who

could not give an estimate, and among those who did, that there are some very divergent practices among companies, with a handful of stating that they blend research on all or nearly all of their projects.

Software developers may be surprised to learn the extent to which researchers are blending qual and quant and should take on board the observation that a third of companies don't find it easy to do. Also, respondents indicate the benefits of speed and cost are proving to be elusive.

### MR's innovation problem

An industry that fails to innovate is likely to be one that will fail to survive. Today, research companies report they are under unprecedented pressure from clients to deliver more for less money. And, clients are increasingly turning to other sources of insight, from data science and forecasting to social media analysts and DIY surveys. These realities risk doing to MR what Expedia did to the travel agency.

For 2015 we decided to look at how research companies are responding to

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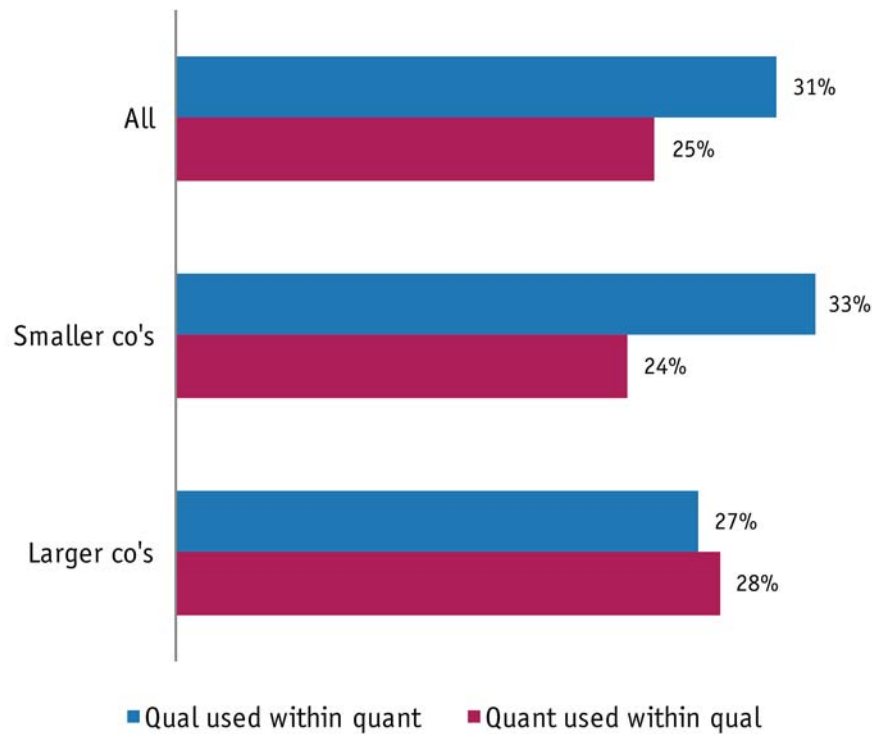


Figure 6: Proportion of quantitative research projects containing elements which use qualitative methods or are analyzed qualitatively. And proportion of qualitative research projects containing elements which use quantitative methods or are analyzed quantitatively.

try really does have an innovation problem, which is not apparent if you attend industry events showcasing innovation.

We asked our participants – all technology decision-makers or influencers in their respective firms – how innovative they thought the industry is as a whole and also how innovative they considered their own company to be. We calibrated the scale from 1 for “highly conservative” to 10 for “highly innovative” and presented it as a slider.

Overall, the score for the industry was a very mediocre 5.6 – the boundary between innovative and conservative being 5.5. Companies rated themselves slightly more innovative, with a mean score of 6.1. Both scores were a fraction higher among larger companies but by global region there was no noticeable difference. We also found just over a quarter of companies rated themselves to be less innovative than their own score for the industry as a whole.

The question shown in Figure 7 explored the ways the companies were attempting to innovate. Innovation can be either continuous (or incremental)

the innovation challenge. Worryingly, our conclusions are that the indus-



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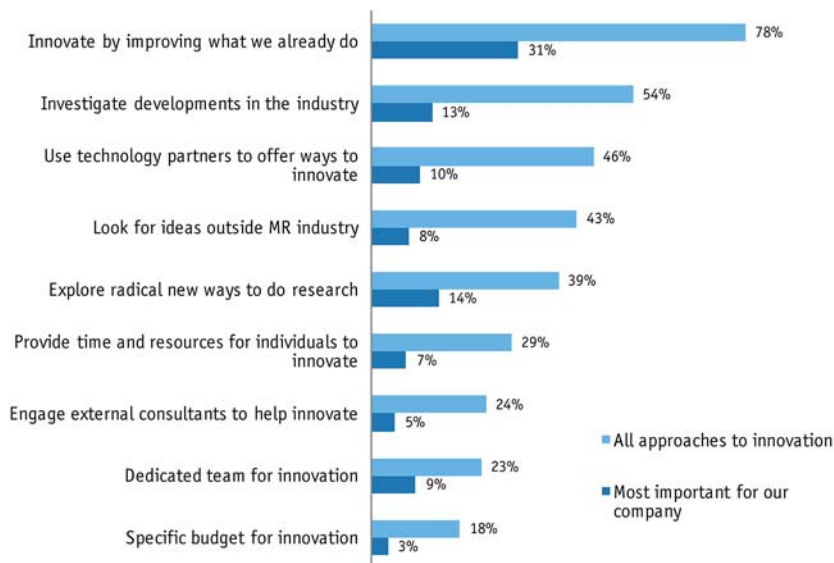


Figure 7: How are companies choosing to innovate?

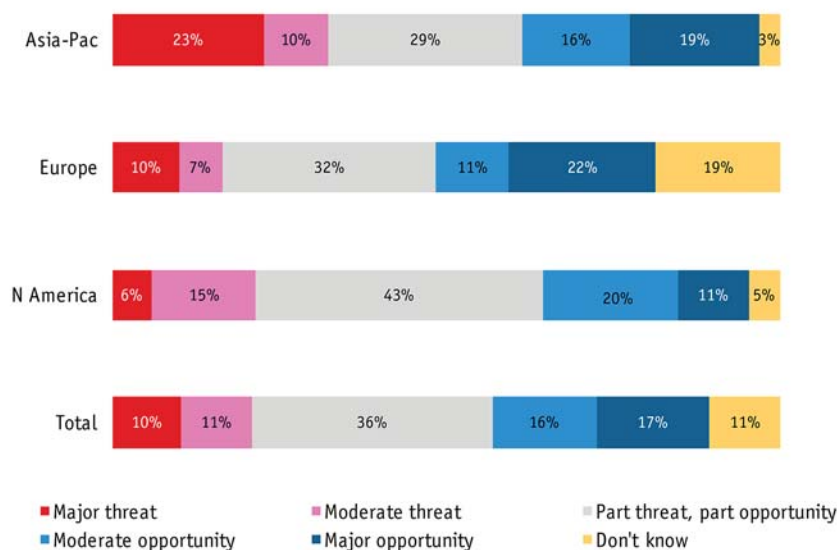


Figure 8: What does disruptive innovation represent for the market research industry?

or it can be discontinuous or potentially disruptive. Companies ideally need to be open to both. We also looked for evidence of active investment (e.g., putting money into it), rather than opportunistic change (e.g., picking up an idea at a conference).

The approaches mentioned most are high on incremental improvement and low on more radical, disruptive change. They are also notably low on methods involving investment. Only one in five of companies placed one of the active investment methods at the top (i.e., “provide time...”, “dedicated team” or “specific budget”).

We wondered how much the fear of disruptive innovation making MR a thing of the past might be playing

out among companies. We asked if technology-driven disruptive change is viewed as an opportunity or a threat. The verdict overall (Figure 8) is a bit of both. Optimists generally outweigh pessimists by two to one but many are ambivalent.

The picture from Asia-Pacific is very different to that of Europe and North America, with a far greater proportion seeing it as a “major threat.” In the previous question, it was also firms in Asia-Pacific that were more likely to be investing in innovation and also pursuing more discontinuous innovation approaches.

Logically, doing better what you already do can only take you so far – yet this is what the survey appears to show

much of the industry is relying on, to ride out the predicted storm. 

Sheila Wilson is research associate and Tim Macer is managing director at meaning ltd., a London-based research technology consultancy that carried out the study on which this article is based. They can be reached at sheila@meaning.uk.com or at tim@meaning.uk.com. A white paper on the report can be downloaded (registration required) from [www.focusvision.com/resources/meaning-report](http://www.focusvision.com/resources/meaning-report).



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●●● customer experience research

# A change for the better

Studies chart the evolution of social media as a customer service channel

| By Marianne Hynd

snapshot

The author traces the trends in usage of Facebook, Twitter and other Web-based forms of customer service across three verticals from 2012 to 2015.

The evolution of social media as a customer service channel has been intriguing. As social media outlets and usage have become more commonplace, what was once used by customers to show loyalty or gain discounts/promotions from their favorite brands has morphed into another means of customer service communication. With this shift came a new, more demanding customer – one who wants to get their issues resolved quickly, using the communication channel they are most comfortable with. The new customer expects a much quicker response, no matter when or where they reach out to the brand.

While the focus at the outset of this trend primarily revolved around social media engagement and marketing, an increase in utilizing social media channels for customer service came into play, most notably through Twitter feeds. Research showed that in 2012, customer service through Twitter was on the rise. Customers were starting to expect assistance to questions, inquiries and feedback with this shift in custom-

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er service. Prior to social media usage, e-mail and telephone contact were the quickest routes for assistance; the advent of live chat options was the first step in real-time customer assistance.

With this new customer service medium came immediacy; as customers engaged through social media, a quicker response time was expected. Similar to e-mail communication, customers in 2012 were initially expecting responses within 24 hours of posing a question or comment on social media. By 2015, an inquiry on Twitter, for example, warranted a response within an hour, if not sooner.

A baseline study was conducted by Ann Michaels & Associates in 2012 to determine company responses to this and other shifts in social media usage. Given the results of the original study, a subsequent study was conducted to learn more about how brands are embracing the “new normal” when it comes to customer service. Have response rates and times improved? Are brands responding to customer inquiries and issues consistently throughout the day, whether it is a weekday, weeknight or even on a weekend? How have companies acclimated to the evolution of social media communication? What changes have been put into play to accommodate the “new customer”? Comparing the results of this current study to those originally obtained in 2012 sheds some light on these important questions.

## Objective

Ann Michaels & Associates sought to replicate the earlier social media response-time study to determine how companies changed in order to adjust to the “new customer.” This study set forth to evaluate response times in various social media channels across nationwide retailers. The results from the current study were compared to those from the 2012 study to additionally determine if increases in responses and/or response times were achieved by these retailers, potentially signaling a direct response to consumers’ social engagement. Identifying gaps in online communication and engagement with consumers will provide a better understanding of the current landscape and provide insight into the evolution of social media interactions

between companies and consumers.

The study focused on two of the largest social media networks, Facebook and Twitter, as well as more traditional contact via e-mail through a company’s Web site. The e-mail response time, while more traditional, can determine the effectiveness of a company’s overall customer service response strategy and determine if the focus of interaction now lies within social media channels versus the more traditional communication or if companies are successfully managing customer service across all modalities of communication online.

## Methodology

Response time study was implemented across social media venues and retail verticals. Ten companies within three verticals were selected: department store, drug/grocery and specialty apparel.

Retailers were selected in each industry based on several criteria, including geography covered and the presence of active Facebook and Twitter sites. This designation would yield results from those companies that have utilized social media as a form of customer communication within recent years to generate comparative results.

Mystery shoppers were utilized to contact target companies with a simple inquiry related to their business. Days and times of contact varied to gain additional information regarding response time across a variety of days and time frames throughout the day. Specifically, contacts were grouped into weekdays (Monday-Friday between 8 a.m. and 4 p.m.), weeknights (Monday-Friday between 6 p.m. and 10 p.m.) and weekends (both daytime and evening hours were investigated).

Results were aggregated by retailer and industry and the results of the study were analyzed across all retailers included in the study, with further analysis focusing on each industry selected and each individual retailer.

## Results

The data collected for this study was analyzed to determine response rates across social media channels and e-mail communication. Response rates were looked at as a whole of

the study and then analyzed on an industry basis. On a secondary level, results were reviewed at an individual company level. Response rates across social media channels, types of contact and times of day were then reviewed to determine if trends exist within these constraints. Finally, the results from this study were compared to data collected in 2012 for further insight into the evolution of social media response time.

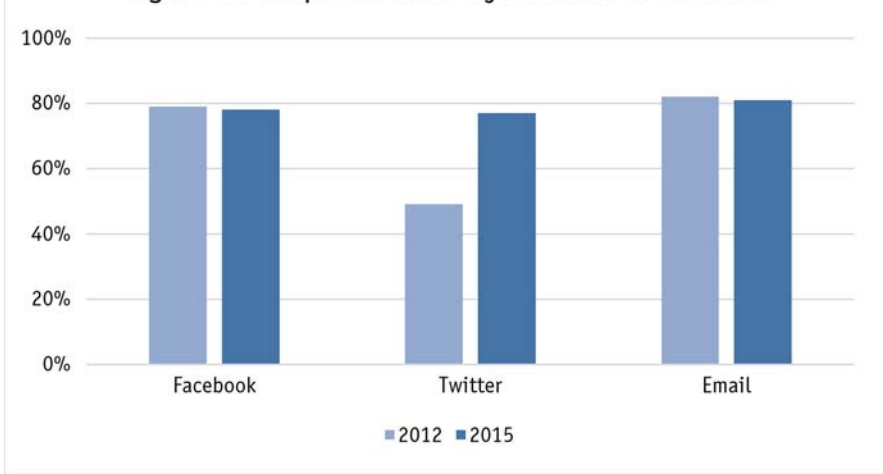
## Overall results – all companies

When looking at response rates across all companies in the study, regardless of industry, results show that a typical response rate was received 79 percent of the time, meaning that no matter which type of contact was made, companies responded to consumer inquiries 79 percent of the time within a three-day window. This has increased from 72 percent in the previous study, indicating a seven-point improvement in overall response time.

Each of the retailers in this study was ranked based on overall response rate across all social media channels. In the initial study, only one retailer achieved a 100 percent response rate across all three communication channels; during the current study, six retailers achieved a perfect response rate, with the majority of the others showing improvement as well.

Time-of-day analysis can give deeper insight into response levels based on time of day and time of week. Overall, performance was fairly consistent across times of days, with weekend and weeknight response rates slightly lower than weekday response rates. Weekday response rates overall were 89 percent, whereas weeknight and weekend response rates were only at 73 percent. A vast improvement was seen in this area as well when data was compared to the 2012 study; at that time, weekday and weeknight responses were provided 71 percent of the time and weekend responses were only provided 67 percent of the time. While lower percentages were seen on weeknights and weekends, overall findings show the improvement in the off-hours periods (nights and weekends), indicating that companies better understand the need for providing consistent customer

Figure 1: Response Rate By Method of Contact



**Response Rate - 2015**

	Overall	E-mail	Facebook	Twitter
All	79%	81%	78%	77%
Department Stores	74%	73%	80%	70%
Drug/Grocery	86%	87%	83%	87%
Specialty Apparel	75%	83%	70%	73%

**Response Rate - 2012**

	Overall	E-mail	Facebook	Twitter
All	70%	83%	79%	48%
Department Stores	77%	73%	87%	70%
Drug/Grocery	72%	93%	80%	43%
Specialty Apparel	61%	83%	70%	30%

service through social venues.

Looking specifically at each channel of communication, Web-based inquiries received the highest response rate, at 82 percent, during the first study and that trend continued in the current study. The most significant finding during the 2015 study revolved around the response times on Twitter, which revealed a 28-point percent increase between the two research periods (49 percent in 2012, 77 percent in 2015). It is apparent that the “value” of Twitter as a customer service channel has been realized. Figure 1 illustrates the percentage of responses gained through each of the channels for both studies.

Web-based “contact us” forms were evaluated to compare social customer service to the more traditional point of contact. While response rates were down slightly from the 2012 study (82 percent to 81 percent) this channel still received the highest response rate percentage. However, the gap has defi-

nately closed between the traditional and newer, social-based, channels.

While Facebook responses were the second-most successful communication channel, percentage of responses fell by 1 percent, from 79 percent to 78 percent. What is interesting to note is that some companies, most notably in the specialty retailer category, did not openly invite customers to post on their timeline, as indicated by the lack of a “post a comment” box at the top of the company’s timeline. In these instances, customers are required to use the private “message” function to ask questions and get assistance. While the brand is still reachable, it may be inadvertently sending a message of a different kind to its Facebook page users: that the brand does not openly welcome comments on its page.

An industry comparison was conducted to determine if any one industry was more successful than others. With regard to overall response rates, drug and grocery stores showed

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Figure 2: Response Time By Contact Channel

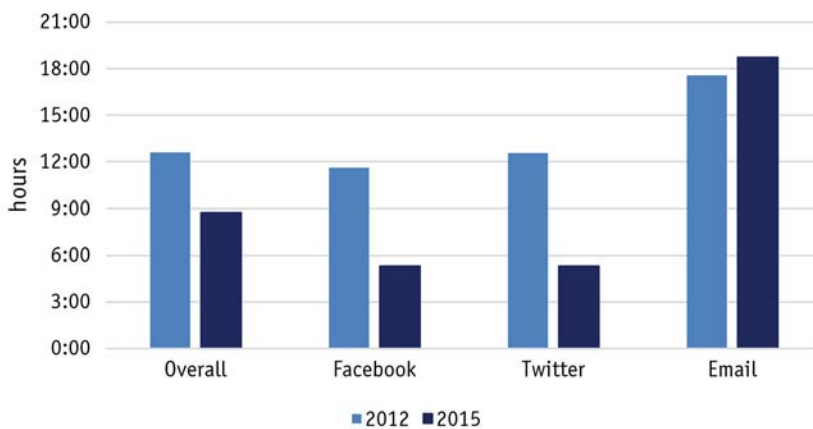
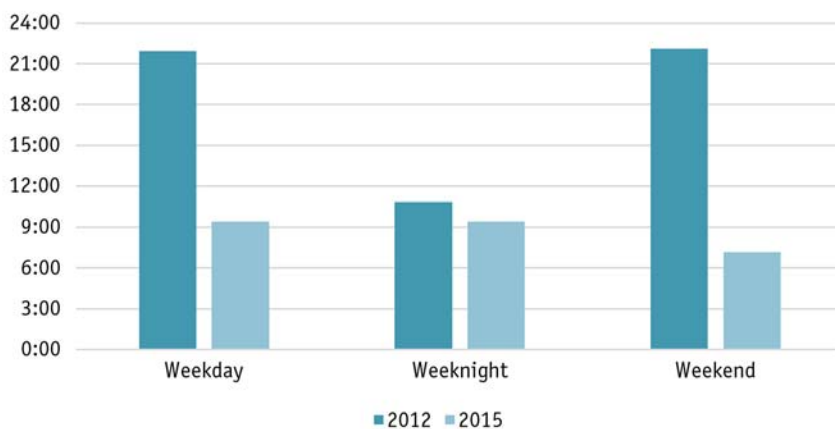


Figure 3: Response Time by Day/Time of Week



the strongest overall response rate at 86 percent. This is a vast improvement since the 2012 study (72 percent). Specialty stores ranked second, at 75 percent, up from 61 percent during the prior study. While department stores showed an improvement over the last study, their overall response rate fell by three percentage points, from 77 percent to 74 percent.

The “Response Rate - 2015” and “Response Rate - 2012” charts show response rate strength across the three channels of communication for each industry for both the current and former research.

It is interesting to note that the significant jump in response rates can be attributed to Twitter responses; whereas e-mail and Facebook responses remained the same or declined slightly in some cases, Twitter responses increased dramatically between the two study periods. This indicates again the value of Twitter as a communication channel and the fact that

companies have taken the advice of those speculating on the shift in social media as a means of customer service since the first study was conducted.

It appears that the value of Twitter from a business perspective has increased exponentially in the last three years, with many companies not only using Twitter as a customer service channel but even going so far as to create a secondary Twitter page dedicated to customer service issues.

### Speed of response

One final component that was evaluated was speed of response. During the first study, it was theorized that responses to inquiries on social sites would generate a faster response time than e-mail/Web inquiries. This, in fact, was true, with Facebook and Twitter responses being received in about half the time as e-mail responses (12.5 hours on average vs 17 hours, respectively). Facebook responses were received slightly quicker than Twitter

responses (11.5 hours vs. 12.5 hours, respectively). This was not surprising given that, at the time of the initial research, Facebook was a more dominant social site than Twitter.

The initial theory was that these numbers would change in the current study, with Twitter outranking both Facebook and e-mail in response rate and speed. It was undecided as to how the e-mail response would change, as etiquette during the pre-social media era dictated a response within 24 hours but came in at 17 hours on average during the initial study.

Overall response time across all channels decreased by approximately four hours. While the highest percentage of responses received were from e-mail inquiries, this channel yielded the slowest response time compared to Facebook and Twitter and the response time actually increased by just under an hour during this recent study. The time to receive a response from Facebook and Twitter inquiries decreased significantly. Figure 2 depicts the hours to receive a response via each channel for both studies.

The average response time across all channels decreased to an average of 8 hours and 45 minutes, down from 12.5 hours in 2012. Facebook and Twitter responses were received within 5 to 5.5 hours, on average, with the response time on Twitter showing the most significant drop from the 2012 study (12.5 hours to 5.5 hours, respectively).

As social media was evolving in 2012, a concern for companies revolved around the fact that social media “never sleeps” and studies indicated that customers’ expectations with regard to receiving a timely response was independent of time of day and day of week; that is, they expect the same, quick response during off-peak times, such as weeknights and weekends as they do during regular business hours.

Data was broken out into response times based on whether an inquiry was made during traditional business hours, weeknights or weekends to determine if this customer expectation was being met and then compared to data from the original study.

Response time decreased dramatically during the traditional business hours and weekends (Figure 3). This is

yet another positive sign that overall, companies have understood the importance of availability at all times when it comes to customer engagement on social media.

Industry-specific data was not significantly different; each of the three industries performed similarly with regard to response time across channel. All industries showed a decline in response time from data collected in the 2012 study. Department stores saw the biggest drop, with average response time declining from 15 hours and 20 minutes in 2012 to only 8 hours and 54 minutes in 2015.

The overall results suggest that in general, companies have embraced social media as a tool for consumer communication. The results of this study indicate that companies are responding to changing customer expectations and offering flexibility when it comes to responding to customer inquiries. This finding accentuates the fact that social media has become a game-changer in customer service and its importance has not been overlooked.

### Industry-specific results

Three industries were selected for this study – department stores, specialty apparel retailers and drug/grocery stores. Ten companies were selected for each industry and a total of nine contacts were made via Facebook (3), Twitter (3) and Web-based contact form (3). Similar to the overall results, each industry was analyzed based on response rates by time, across channel and across time of day/day of week.

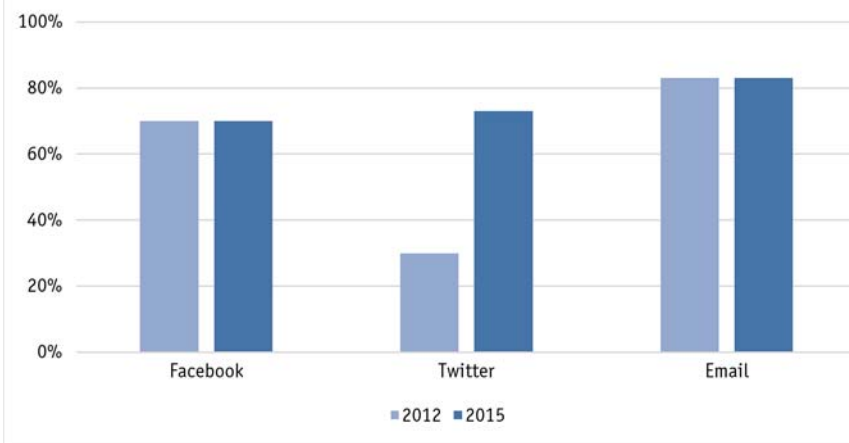
#### Specialty apparel retailers.

Overall response rates were evaluated and companies were ranked based on overall response rates within this study. As an industry, companies responded to customer inquiries across all channels 75 percent of the time, up from 61 percent.

When looking at response rates by communication channel, e-mail contact via a company’s Web site form yielded the strongest results, with an 83 percent response rate. Twitter closely followed with a 73 percent response rate and Facebook responses were the least successful, at 70 percent, which is still a strong percentage of responses.

Of interest to note is the improvement within Twitter. While this has

Figure 4: Response Rate by Channel Comparison



been a prominent theme in the current study, it is important to show the dramatic increase in Twitter responses within this vertical. Figure 4 illustrates the significant uptick in Twitter responses in the specialty apparel industry.

Time of day was investigated to determine if there is a disconnect at any point. Overall results show that response rates were higher on weekdays than weeknights and weekends. This pattern is more typical of what

was seen during the original study and has shifted, indicating that companies in this vertical were more responsive during the “non-peak” hours, though overall response rates were significantly higher. Only weekend response rates stayed stagnant across both studies. Figure 5 shows a comparison between the data from both studies.

In summary, the specialty retailer industry as a whole is embracing social media channels as a form of customer engagement, most notably with



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Figure 5: Response Time Comparison - Time of Day

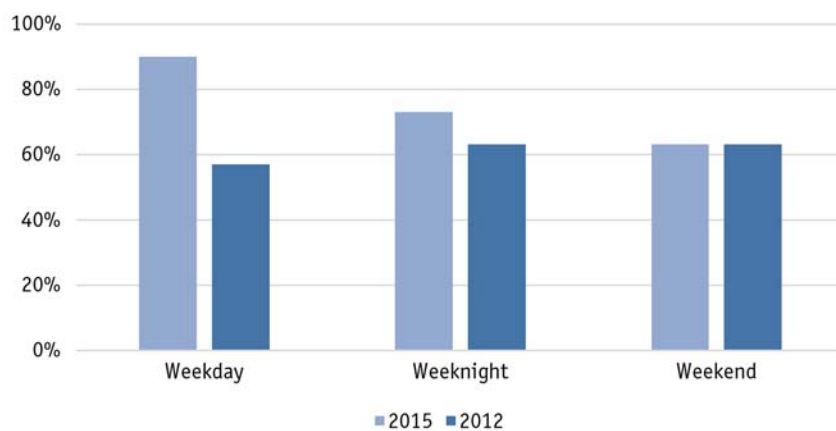
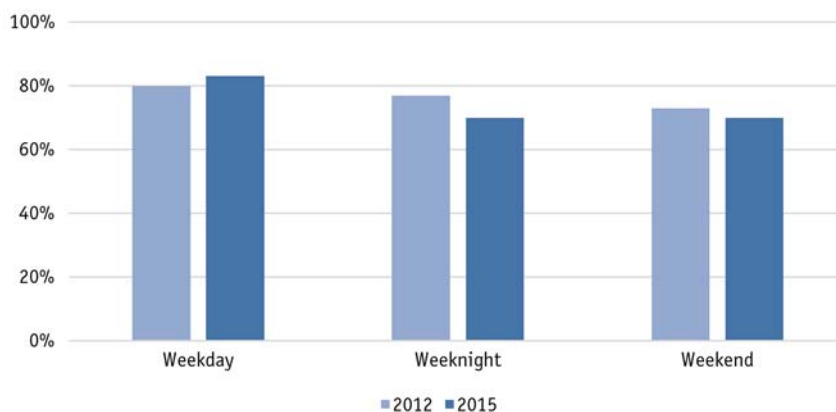


Figure 6: Response Rate by Time of Day Comparison



regard to Twitter usage. Of the two social sites, Facebook dominated in this area in the earlier study; Twitter has far surpassed Facebook with regard to improvement. E-mail remains the most consistent method for responses. That being said, the dramatic increase in Twitter usage shows the importance of social media and company response to this shift in consumer expectation.

**Drug/grocery.** Overall response rates were evaluated within the drug/grocery vertical. As an industry, companies responded to customer inquiries across all channels 86 percent of the time, up from 73 percent. This vertical had the highest overall response rate across the three in the study.

When looking at response rates by communication channel, e-mail and Twitter contacts had response rates of 87 percent; this is down for e-mail contact but a significant increase in Twitter responses from the original study (93 percent and 43 percent, respectively). Facebook response rates

improved slightly, from 80 percent in 2012 to 83 percent in 2015.

Time of day was investigated to determine if there is a disconnect at any point. It was initially thought that weekend and/or weeknight responses would be weaker than weekday responses in the original study. At that time, response rates in this vertical were fairly consistent, with weekday response rates slightly higher than weeknight/weekend response rates (73 percent and 70 percent, respectively).

Current results show improvement across all three times of day, with the largest jump in response rates during business hours (up to 93 percent from 73 percent) and weekend hours (up to 87 percent from 70 percent). Weeknight responses also showed a nice seven-point improvement, from 70 percent to 77 percent. Results suggest that this vertical has adjusted to the demands of the new customer nicely over the last three years.

In summary, the drug and grocery

vertical has shown the most significant improvement in response across all channels but specifically within social media sites. Similar to findings in other verticals, Twitter usage has increased exponentially and response rates improved greatly. While e-mail response rates have declined slightly, this is not worrisome or statistically significant. It appears, based on current findings, that this vertical has also embraced the demands of the new customer and has embraced it well.

**Department stores.** Overall response rates were evaluated and companies were ranked based on overall response rates within this study. As an industry, department stores responded to customer inquiries across all communication channels 74 percent of the time, down from 77 percent during the last study. It is interesting to note that this vertical had the strongest response rate during the original study and fell to the bottom of the pack during this study. This may be attributed to the fact that there were some issues with sending e-mail responses to one particular retailer – there were several attempts to use the contact feature on the site but doing so yielded no response. It is unclear if it was a known error or if the Web site was having technical difficulties during the time the study was conducted. When the e-mail response rate for this retailer is removed from the overall data, this vertical's response rate comes in at 77 percent, which is consistent with the earlier results.

When looking at response rates by channel, Facebook again yielded the strongest results, with an 80 percent response rate, falling from 87 percent during the original study. E-mail and Twitter contacts remained the same as the original data, with 73 percent and 70 percent response rates, respectively. It should be noted that e-mail response rate increased to 81 percent when data for the outlier retailer's e-mail contact was removed.

Companies in this vertical showed a consistent performance overall. It was theorized that, at the time of the initial study, this vertical had started to acclimate to the new customer expectations at a faster rate than others and the other verticals would catch up in this most recent study. However,

this does not explain the overall decline in response rate. While the technical difficulties with one retailer's contact site impacted the overall data, even removing this portion from the overall statistics shows results that have remained largely unchanged since the 2012 study.

Finally, time of day was investigated to determine if there is a disconnect at any point. It was initially thought that weekend and/or weeknight responses would be weaker than weekday responses, which was found in the original study.

Overall results from this current set of data show that again, response time across times of day and day of week remains fairly consistent, with slightly lower rates of response generated during weeknights and weekends. Compared to earlier research, response rates improved during business hours but fell slightly during weeknights (from 77 percent to 70 percent) and weekends (from 73 percent to 70 percent). Figure 6 illustrates response time data for the two study periods.

In summary, this industry did not fare as well as the others with regard to consistent response rates and growth was not evident. While starting off strong three years ago, it was anticipated that companies in this vertical would yield the greatest improvement, as they had started strong and have had three years to refine and perfect this aspect of customer service.

### Exciting to see the transformation

At the time of the original study, social media as a customer service channel was emerging but was not well-defined. At that time, it was theorized that companies would realize the importance and impact of social media usage for customer service and that, over time, response rates would improve. The results of this study certainly support those views and it is exciting to see the transformation social media has taken.

While response rates and times have improved, there is still room for more improvement. Continuing to focus on creating social sites that encourage customer engagement is vital. While Twitter usage has become more prominent, Facebook engagement has

declined slightly and some company pages in this study have made it clear, either through intention or unintentional actions, that customers may get a quicker response on Twitter. This was evident when company pages on Facebook did not allow followers to post directly to their timeline; instead, only private-messaging options were available. This was also evident by the significantly strong response times on Twitter compared to Facebook. As consumers tend to engage where they feel most comfortable, companies need to be aware of making engagement easy on all social sites.

One striking finding suggests that longevity of consistent engagement may be a concern, as seen in the department store vertical. This segment outperformed the others originally and has since maintained its performance or, in some cases, showed a decline. This may be an indication that, while important to the customer experience, it may be difficult to maintain without the proper planning and strategic alignment.

Overall data suggests that great gains have been made in social media communication; the next step for companies to embrace for continual improvement revolves around pinpointing customers who are talking about them on social sites yet not directly on their social sites. By utilizing a social media monitoring program, companies can benefit from finding indirect conversations and engaging with those customers. While this was not specifically looked at during this study, future studies may focus more on indirect contact and how it is managed or acknowledged by companies.

Customer satisfaction is becoming more of a challenge but it appears that companies are adapting to the "new customer" and their expectations. The results are promising and show that companies are in fact realizing that, in order to be successful and maintain high satisfaction levels, they need to adapt as social media continues to evolve. ①

Marianne Hynd is vice president of operations at Ann Michaels & Associates, a Naperville, Ill., research firm. She can be reached at mhynd@ishopforyou.com.

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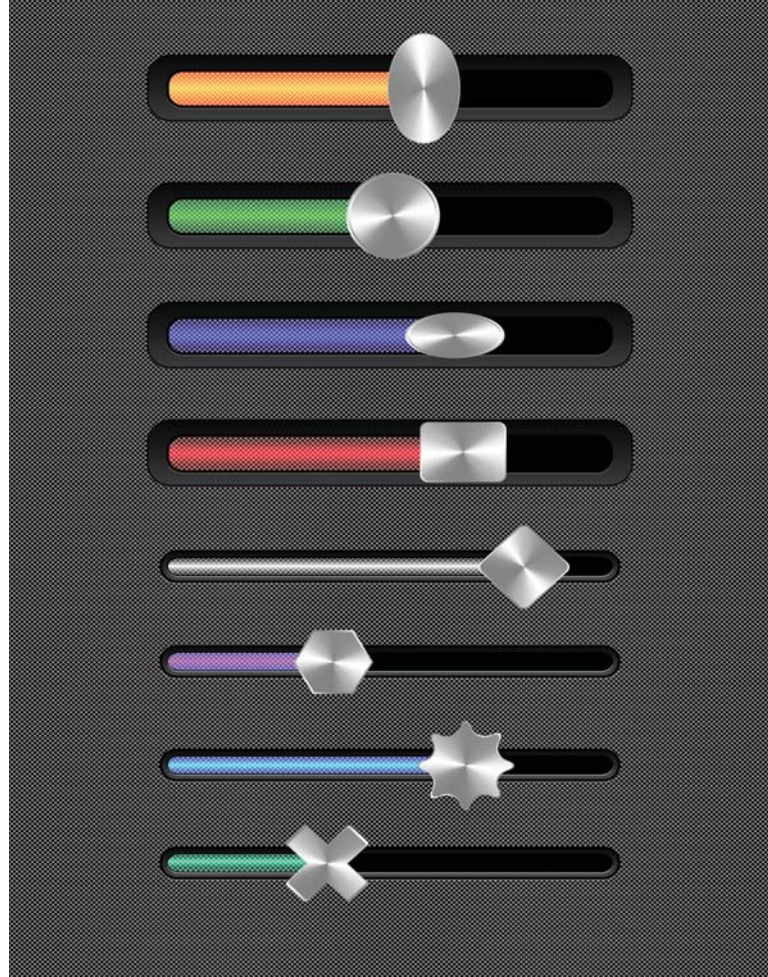
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●●● survey design

# A touchy subject

Are sliders too slick for surveys?

| By Trent D. Buskirk



## snapshot

Four research firms teamed up to compare slider and radio button scales as input methods for surveys fielded on smartphones, tablets and computers.

As the research and development process for optimizing surveys for smartphones, tablets and computers continues there is a need to take a closer look at all of the different facets of survey-taking and survey-writing. To this end, Marketing Systems Group collaborated with researchers from MaritzCX, Research Now and FocusVision on an experiment to compare slider and radio button scales as input methods for surveys fielded on smartphones, tablets and computers. (The outcome of the experiment was published in the journal *methods, data, analyses*, volume 9 in 2015. To view the full published paper, citations and references please visit <http://bit.ly/iWGBUI.n>.)

This study focused on input styles including newer touch-friendly slider bars and more standard radio buttons. In an era where touch-enabled devices are rising in popularity, knowing what respondents prefer and how they use different input styles will have a great impact on surveys designed to enhance the user experience on these devices. Results of the experiment suggest that the input style preference varies among devices and that slider bars might introduce some undesirable measurement issues compared to radio buttons.

### More weaknesses than strengths

The study directly compared outcomes from respondents who completed a collection of survey scales using their smartphone, tablet or computer. Within each device, respondents were randomly assigned to complete one of 20 possible versions of scale items determined by a combination of three experimental factors including input style, length and number formatting. Results from this study suggest more weaknesses than strengths for using slider scales to collect survey data using mobile devices and also suggest that preference for these touch-centric input styles varies across devices and may not be as high as the preference for the more traditional radio button style.

Participants for this study were recruited from Research Now's U.S. consumer e-Rewards



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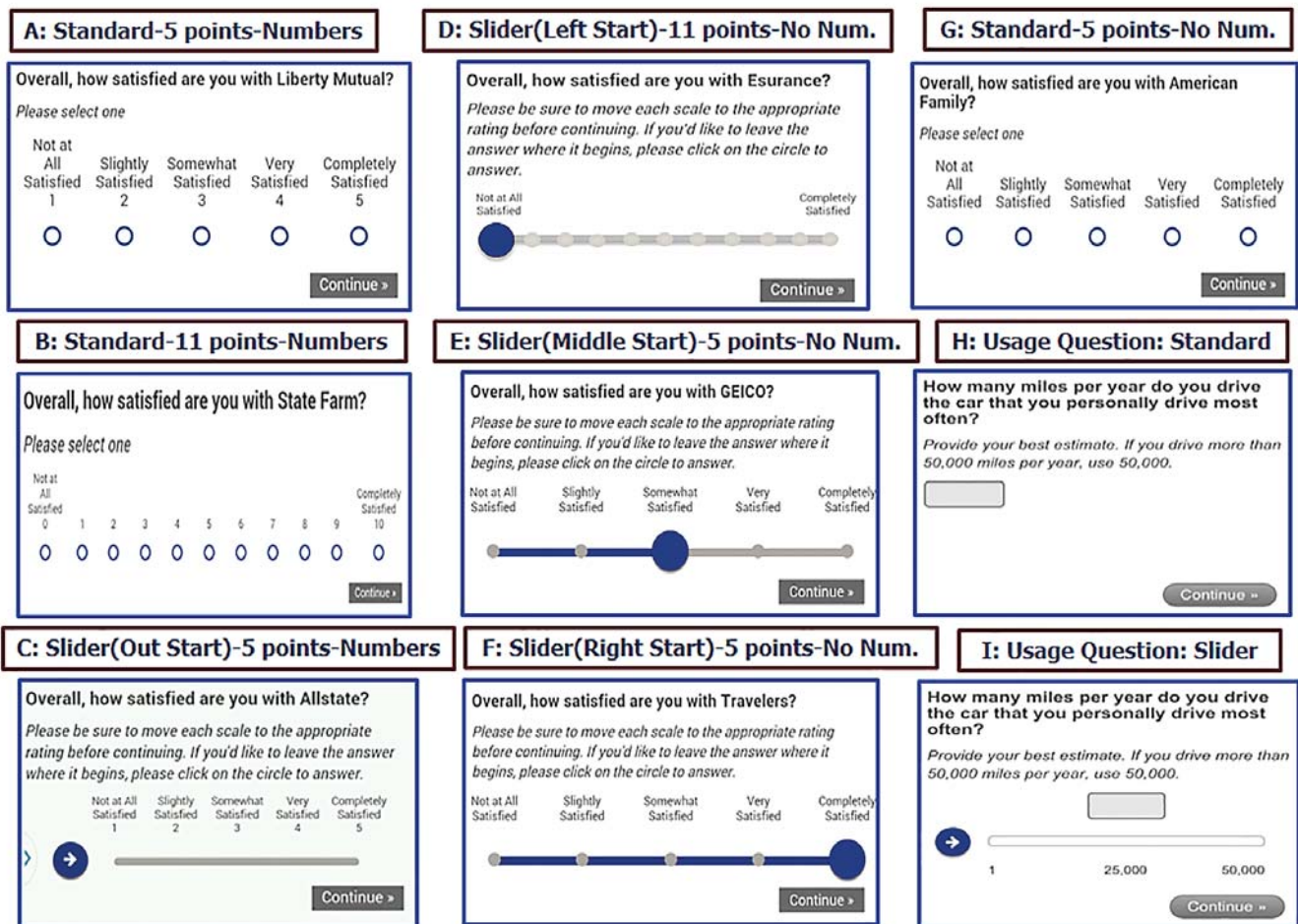


Figure 1: A-G are visual examples of the various factor combinations for the 22 core scale items as viewed on a smartphone. H and I refer to text input versus slider input for the single usage item (also viewed on a smartphone).

panel, which consists of nearly 2.5 million adults, making it one of the largest sources of online responses in the U.S. The overall survey consisted of up to 60 possible questions about automobile insurance satisfaction and was designed to be completed in no more than 10 minutes using a Web browser. The survey was optimized for mobile devices and was fielded in the U.S. between April 4 and 11, 2014 and each respondent received an e-incentive that was comparable in value to other panel surveys of similar length.

Due to limitations with device availability across all panelists, device type was not randomized but served as a natural blocking variable. All experimental randomizations were thus made within each type of device separately and independently. After clicking [Start] on the introduction page, each panel respondent was then randomized to receive scale items for the experiment that were formatted according to one of five possible scale

types including: standard radio buttons or sliders with either an outside, left, middle or right starting position (as illustrated in Figure 1: A, C-F).

We provided an additional instruction for respondents in any slider scale group to click on the slider handle if their answer was consistent with where the slider began (see Figure 1: C-F). Because this experiment was conducted within the scope of a market research study that required standard radio button scales to produce estimates, the randomization to the scale type used a 4:1 ratio within each type of device with four respondents being randomly assigned to standard radio buttons for every one randomly-assigned to each type of slider scale. In addition to scale type, respondents were equally randomized to one of two scale lengths (five-point vs. 11-point) and equally randomized to one of two scale numbering formats (numbered versus not numbered). All five-point scales were fully anchored with

semantic labels and the numbered versions also included number values below each of the semantic labels (see Figure 1: E, G and A, C, respectively).

In this article we focus on 22 “core survey items” organized into three broad categories with questions pertaining to 1) overall satisfaction with current automobile insurance provider; 2) overall automobile insurance brand performance (e.g., trust, discounts, customer service, convenience, value and accessibility) and 3) preferences for automobile insurance service (e.g., automobile insurance purchase and agent interactions, mobile transactions with insurance company, etc.). These core survey items were presented to participants over seven separate screens. The actual values assigned to responses for five-point scale items ranged from 1 to 5 and from 0 to 10 for 11-point scale items.

A total of 1,201 computer, 1,199 tablet and 1,198 smartphone respondents completed the experiment.

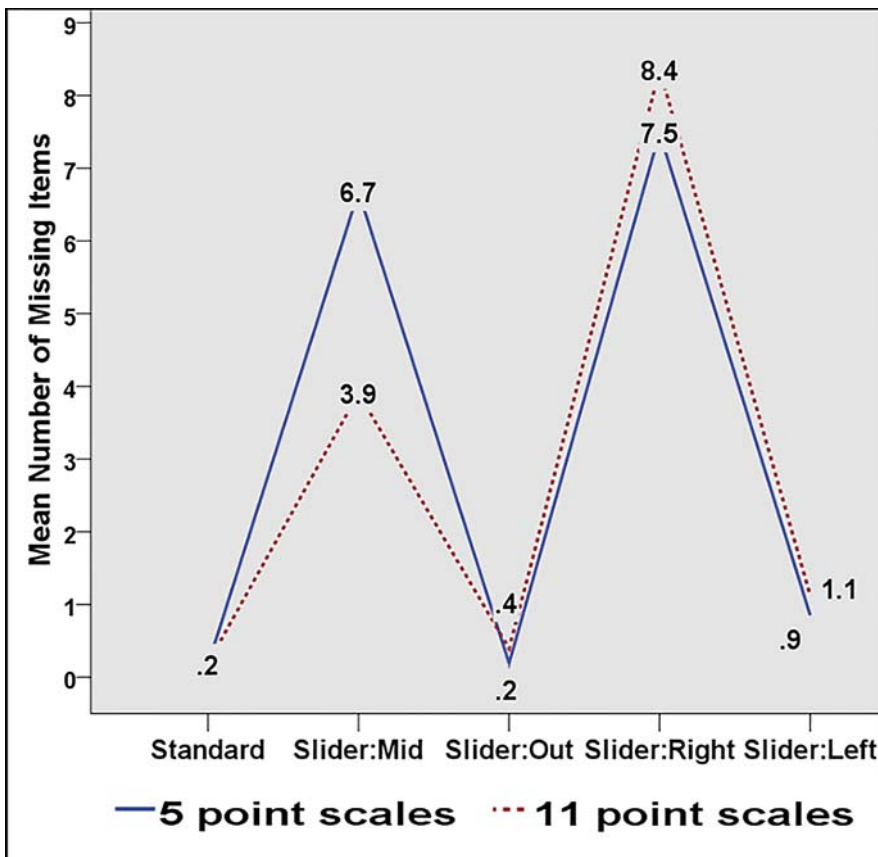


Figure 2: Mean number of missing items by scale type and scale length.

Completion times for the collection of 22 core scale items (on the natural log scale) varied significantly by both the device used for completing the survey ( $F(2, 3169)=27.27$ ;  $p\text{-value}<.0001$ ) and by the scale type ( $F(4, 3169)=3.85$ ;  $p\text{-value}=.0040$ ) and these effects were additive in that no interaction between these two factors was detected. Specifically, the geometric mean completion time for PC respondents was estimated to be about 19 percent longer than that of smartphone respondents ( $p\text{-value}<.0001$ ) and estimated to be about 23 percent longer than that of tablet respondents ( $p\text{-value}<.0001$ ). No significant differences were found in completion times for the core scale items between smartphone and tablet respondents ( $p\text{-value}>.01$ ). Respondents assigned to the slider left-start and slider outside-start groups had the longest estimated geometric mean completion times (about 135 and 133 seconds, on average, respectively) and the geometric mean completion time for the slider left-start group was estimated to be about 11 percent longer than that for the slider right-start group ( $p\text{-value}=.0024$ ). No other significant differences in completion

times were found between any of the other scale types.

### In the opposite direction

Our results for survey completion times among the slider with a left-start group echo the findings from prior research in direction but the differences we observed were not statistically significant. However, our findings for the other slider start positions, including most notably sliders with a right or middle starting position, were in the opposite direction in that we found completion times for respondents in these two groups to be shorter than those for the standard scales, albeit not statistically significantly different. This opposing result could be directly related to the fact that we observed higher missing items from respondents from both the middle- and right-starting slider scale groups as shown in Figure 2. In some cases, respondents in the right-slider start group who were highly satisfied with their insurance provider might have taken much less time to answer the satisfaction questions simply because their responses corresponded to the slider starting position. As such,

respondents may not have taken the time to click on each item but instead hit the next button for the survey to continue, resulting in missing data.

As Funke et al. (2011) note, “if the handle is placed at the position of a valid answer, intentional response and non-response cannot be distinguished.” One starting position that would avoid this issue is outside or off of the slider itself. However, this choice requires more space for the overall slider graphic. While making the slider handle smaller to create more room for the actual slider bar itself might work for mouse interfaces, it might be less optimal for interfaces that rely on finger taps. In our study we also found that respondents completing scale items using an outside starting slider were the least likely to prefer slider scales compared to any other starting position.

Another option to remedy the missing-item issue might require respondents to move the slider away from its starting position and then back to the response category to register the response. Such a requirement would, however, increase the number of taps required to complete the question from one to two for the slider scales compared to what is required for the radio button scale (Buskirk, 2015b). Such an approach was used by Sellers (2013), who compared slider bars scales with middle, left and right starts to radio buttons. They found that with a forced-choice requirement, respondents in the right slider group reported higher right-choice options and respondents in the left-choice group reported more lower-choice options compared to respondents in other groups. Contrary to the method employed by Sellers, we did not force respondents to confirm answer choices for which the slider was neither moved nor clicked and we observed that respondents in the middle- and right-slider start groups tended to select these answer categories significantly less often than any other scale group, as shown in Figure 3. The presence of missing items among the middle- and right-slider starting positions translated into overall scale measures that were consistently and significantly lower, on average, compared to the same measures reported

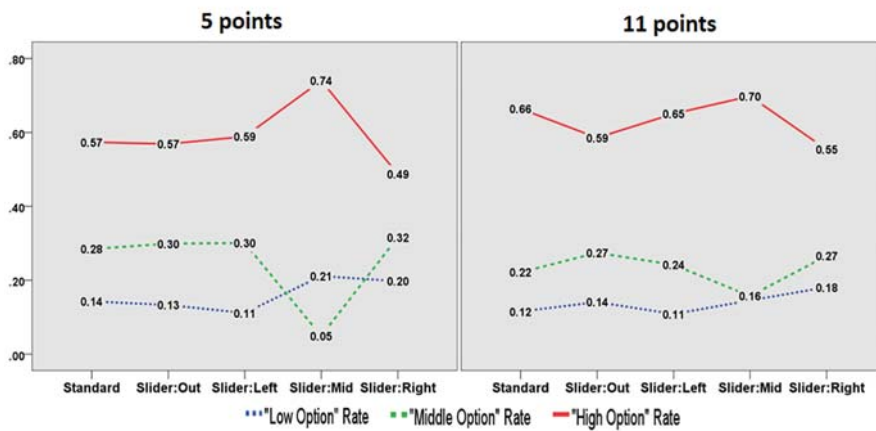


Figure 3: Low, middle and high option selection rates by type and length of scales for core scale items answered.

from the other slider starting position or radio button groups – in some cases as much as 35 percent less.

Respondents in the right-start slider scale group who registered answers for scale items moved the slider away from the starting position but ultimately did not move it back. This pattern was generally consistent across the three devices and both scale lengths; however, the pattern was much stronger with the shorter version of the scale as shown in the left pane of Figure 3. More specifically, the high option selection rates for those assigned to five-point scales (defined as selecting a 4 or 5 on the 1-5 scale) with middle slider scales were 25 percent higher than those from any other scale group. Respondents seeing five-point scale items in the right slider group selected higher categories at rates that were between 8 to 50 percent less than those of any of the other scale groups.

We also found that respondents in the middle slider start group also chose lower-end options (i.e., 1 or 2 on the five-point scale; 0, 1, 2 or 3 on the 11-point scale) more often than any other scale type except the right-slider start group. This finding replicates the pattern observed by Petersen et al. (2013), who reported higher amounts of 2s and 4s being selected on a five-point slider scale that had a middle start compared to other non-slider presentations.

The similarity in the percentage of respondents in the left-starting slider and radio button groups choosing higher options for the core scale items echoes what Cape (2009) found in a study comparing left-starting sliders with different labelling options to more

traditional radio buttons. Specifically, Cape (2009) found that while distributional differences were noted for survey outcomes across different scale types, the “box top” or percentage agreeing with a statement were nearly identical across the scale types. However, in our study we also saw contrasting results between the radio button group and both the middle-slider group, where respondents had significantly higher “box top” rates, and the right-slider group, where respondents exhibited significantly lower “box top” rates.

In addition to differences in completion times, missing items, response options and survey outcome measures, we also found differences in preferences for the slider scales. Such differences in preference rates by scale input style might reflect more of a conditioning effect in that respondents may likely prefer what they are comfortable with rather than something new. We expected that some respondents with a radio button survey input style would, for example, express higher preferences for radio buttons when faced with a choice between those and a new slider version and, conversely, for slider input styles.


Indeed, others have found somewhat similar results in experiments that simply asked satisfaction with sliders/radio buttons at the end of the survey experience without requiring respondents to choose between alternate methods of input. In our study we certainly saw evidence of a conditioning effect for preference as well in that those who were presented slider-bar questions in the main experiment and then asked to complete an item using radio buttons generally expressed

interest in sliders. However, they did not express this interest as consistently as those who completed standard scales in the experiment and then completed one additional slider item did for standard radio buttons (76 percent of respondents in the radio button version expressed interest for radio buttons compared to 63 percent of respondents in a slider group who expressed interest for sliders).

We also found that generally, the preference for sliders increased from PC to tablet to smartphone respondents but the degree of differences across devices was still influenced by the input style to which respondents were assigned. More work is needed to better understand whether preferences for sliders might be higher among PC respondents who have touchscreen monitors compared to mouse-only input.

### Come at a cost

While sliders may offer more engagement for respondents they come at a cost when thinking about implementing them across many device types with differing space and hardware constraints. And, no matter how engaging sliders can be compared to radio buttons, missing items still persist and can certainly be a function of starting position as well as the underlying distribution being estimated. Preference for sliders tends to skew towards those using mobile devices to complete surveys but this preference doesn't overwhelm previous experience with radio buttons.

Even though sliders might be more preferred by smartphone respondents, they also add to the completion times, overall. And, given that many studies have consistently shown that surveys tend to take longer on smartphones compared to PCs (Buskirk, 2015b, Wells et al., 2014), it's hard to know whether the positive impact sliders have on engagement would outweigh or be nullified by the negative impact of longer surveys. More work is needed to understand just how slick a slider needs to be to hit this sweet spot. 

Trent D. Buskirk is vice president of statistics and methodology at Marketing Systems Group, a Horsham, Pa., research firm. He can be reached at 215-653-7100 or at tbuskirk@m-s-g.com.



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# Changing their beliefs

Inertial purchasing propensities in B2B markets

| By David Soorholtz and Terry Grapentine



## snapshot

By identifying and understanding factors affecting inertia in the buying process, companies can focus resources on their most viable potential customers.

We have conducted B2B marketing research since the late 1970s and observed an increasing tendency of customers in some B2B markets to display what we describe as inertia in their buying habits. Clients describe some of their customers and prospects as rarely switching brands and, seemingly, not because of brand loyalty. Rather, clients describe these customers as being on autopilot: They don't seriously consider brand alternatives in the face of new product introductions and many express the belief that, "If it ain't broke, don't fix it." Psychologists refer to this behavior as cognitive inertia:<sup>1</sup>

*"Cognitive inertia refers to the tendency for beliefs or sets of beliefs to endure once formed. In particular, cognitive inertia describes the human inclination to rely on familiar assumptions and exhibit a reluctance and/or inability to revise those assumptions, even when the evidence supporting them no longer exists or when other evidence would question their accuracy. The term is employed in the managerial and organizational sciences to describe the commonly observed phenomenon whereby managers [or customers] fail to update and revise their understanding of a situation when that situation changes, a phenomenon that acts as a psychological barrier to organizational change [or brand switching]."*<sup>2</sup>

This is an active topic in the academic literature and many articles have been written about inertia in B2B marketing. For example, Yanamandram et al. (2006) examine inertial tendencies as a major component of "switching barriers" in selected B2B markets;<sup>3</sup> White et al. (2007) investigate inertial and customer retention issues in B2B service markets;<sup>4</sup> and Fred Wiersema (2013) discusses inertia from the perspective of global B2B markets.<sup>5</sup> Some of the findings coming out of this and our own research suggest that inertia can be a significant problem in B2B markets where, for a given product category, many good alternatives are available from different competitors and where assessing product performance prior to product purchase is difficult.

B2B marketers want to believe that their customers behave rationally and make brand decisions in a logical and fully-engaged manner. We have found, however, that all too often



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this is not the case. Do these customers just not care? Or do they simply not understand that manufacturers are often providing important inputs that they can use in their businesses?

We believe that in many cases, it is not that customers do not care or fail to understand these products or issues; rather, they are experiencing cognitive inertia.

### Set of beliefs

Cognitive inertia is a set of beliefs – not related to conscious brand loyalty – that result in business customers failing to switch brands over an extended period of time. Example perceptions that can lead to cognitive inertia are that:

- Switching brands entails too many risks that cannot be adequately assessed prior to switching (e.g., changing brands may lead to undesirable effects).
- “All brands are the same,” so nothing is to be gained by switching.
- “I have better things to do with my time than investigate a new product.”

Recently, a B2B client wanted us to explore the issue of inertia in the hope that the research might shed light on how their marketing and sales departments might address this issue. One question they had was: Are some customers less inertia-prone than others and, if so, how can we best identify and market to them?

Note that this research focused on a single product category in which we and the sponsor hypothesized that cognitive inertia exists, based on our background market knowledge.

Example Factors that May Lead to Inertial and Loyalty Tendencies

Beliefs	Behaviors	Experiences
All brands perform equally	Loyalty toward a particular manufacturer	No negative experiences with current brands
Currently used brands are better than alternatives	Loyalty to sales rep	Negative experiences with past brands that resulted in switching
High opportunity costs of switching	“Habit”	Positive experiences with the sales rep (e.g., availability, attentiveness)
Currently-used brands are the lowest-priced	Late adopter of new technology	Self-realized proof that current brand is “better”
All brands are acceptable (“good enough”) even though they do not perform equally	Degree of “openness” to new ideas	
Switching requires too much effort		
Switching may result in negative events caused by the new product		

The research investigated whether the company could segment customers on their level of cognitive inertia and, if so, whether the firm could develop marketing strategies designed to budge the least inertia-prone prospects into considering the company’s products. The study (details of which are disguised to protect client confidentiality) was conducted in four phases: exploratory research, quantitative market segmentation research, target marketing assessment and product positioning development.

### Step 1: Exploratory research

Two waves of exploratory research were conducted prior to launching the quantitative market segmentation phase of the study. The first exploratory wave involved conducting in-person interviews with customers in the target market. This research uncovered a significant amount of cognitive inertia among most respondents. The second wave involved conducting in-depth

telephone interviews of customers who had recently switched brands.

Both qualitative waves allowed us to compare and contrast customers who displayed varying degrees of cognitive inertia and brand switching behavior. The chart summarizes factors contributing to inertial and company/product loyalty propensities. Information from the chart informed the design of the quantitative market segmentation phase of the study.

One general observation coming out of this exploratory research is the concept of active vs. passive inertia. In some situations, inertia is active – for example, the customer consciously does not consider switching brands, not because he is loyal to the current brand but because he has been “burned” in the past when he switched brands and the current brand’s performance is acceptable. In contrast, passive inertia describes a situation in which the very thought of considering alternative brands is not

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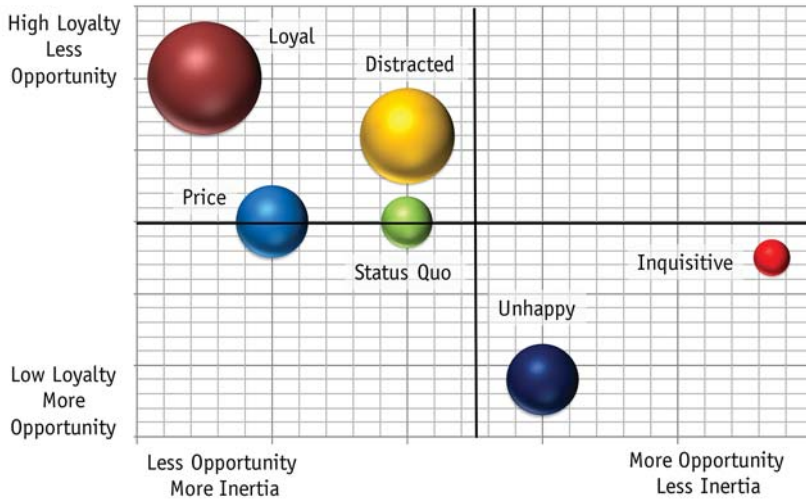
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Figure 1: Inertia and Loyalty Segments



small portion of the entire market. This corroborated our prior hypothesis that most customers in this market exhibit high levels of cognitive inertia and do not offer much opportunity for the client. Motivating the majority of customers in this segment to switch brands is difficult if not impossible. Second, there is a general negative correlation between overall loyalty and cognitive inertia. On average, lower levels of loyalty are associated with lower levels of cognitive inertia. Finally, as a check of face-validity, historical self-reported switching behavior was higher for the Inquisitive and Unhappy segments vs. the remaining segments.

**Inquisitive:** This is the least inertia-prone segment and has average loyalty scores. A major factor that differentiates this segment from others is intellectual inquisitiveness with respect to the product category. Members of this segment are more likely to read professional publications about technology in this product category and are more likely to believe that, if they were to research alternative brands in

salient – for example, the customer is too busy with other demands or she does not consider the product category in question important enough “in the scheme of things” to warrant researching alternative brands.

Example Factors that May Lead to Inertial and Loyalty Tendencies

**Step 2: Quantitative market segmentation research**

In this market, Internet panels of customers are available from several sources; consequently, we used a Web-based study lasting an average of 20 minutes.

The study identified six segments: Loyal, Distracted, Price, Status Quo, Unhappy, and Inquisitive. Figure 1 plots the segments along two dimensions – overall loyalty and inertial tendency. The size of the bubbles reflects the relative sizes of the segments.

Overall loyalty, denoted by the vertical dimension, is an index made up of several attributes on which respondents rated a company with respect to their satisfaction, likelihood to use in the future and likelihood to replace with another manufacturer in the future.

The horizontal opportunity/inertia axis is a composite score of several attributes measuring the belief that investigating alternative products is worth the respondent’s time and would actually result in finding a better product. The further to the right a segment is positioned on this axis, the less inertia-prone that segment is and the

more opportunity it offers a manufacturer. The dark horizontal and vertical lines in Figure 1 help the reader to visualize the relative positions of the segments to each other.

Note two general findings from Figure 1. First, the combined relative size of the least-inertial segments – Inquisitive and Unhappy – is a very

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the target category, they would find a better product. They are also the youngest of all segments.

**Unhappy:** This is the second-least inertia-prone segment and also the least loyal. Dissatisfaction with their current product supplier distinguishes these customers from those in the other segments.

**Status Quo:** Customers in this segment are relatively pleased with the performance of their brand and the company they purchase it from. They do not display any inquisitiveness

about new technology or a desire to improve upon their current marketing practices with respect to the target product. In a sense, these customers are on autopilot.

**Distracted:** Members in this segment express above-average loyalty to their current supplier of the target product. What differentiates them from other segments is that they are simply so busy with other aspects of running their business that no real attention is given to the target product. "If it ain't broke, don't fix it," is their

management mantra.

**Price:** The existence of a price-oriented segment in B2B markets is not uncommon. It was expected in this market, since some customers serve retail trade areas with lower-than-average yearly household incomes. Their retail customers simply cannot afford to purchase more expensive products in the target category. Consequently, this segment purchases the least-expensive products in the category and will only switch when a comparable product at a lower price is introduced – which, in this market, occurs rarely.

**Loyal:** Members of this segment display the least cognitive inertia and express the most loyalty to their supplier. These purchasers have an excellent relationship with their supplier and feel loyal to the perceived excellent performance of the brand they purchase from that manufacturer. Interestingly, this is the single largest segment.

### Step 3: Target marketing assessment

Once the market segmentation phase of the research is completed, the next step is to identify the most attractive segments in the group. As suggested in Figure 1, among the six segments we identified, two – Inquisitive and Unhappy – offer the company the most potential because of their a) relative openness to consider different brands in the target category and b) somewhat lower levels of loyalty toward their current manufacturer.

### Step 4: Product positioning development

How then should companies address the Inquisitive and Unhappy market segments? Clients who have segmented their markets on loyalty/inertia have taken several steps.

First, many of the issues that define the segments can be observed or learned by the sales rep (e.g., "Which customers actually read professional journals?"). Consequently, we developed an algorithm that the company's sales reps can use to classify its customers across the six segments. This helps to streamline the selling process by allowing reps to identify the most likely targets and stop beating their



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heads against the wall to convert the most inertia-prone customers. This algorithm can also be used by the company as part of its overall CRM strategy to use data collection methods other than in-person sales calls to profile its customers and target communications to the least inertia-prone.

Second, some clients have developed a Web-based information service helping customers find relevant technology-related articles and research across a variety of industry information sources. Reps distribute information to Inquisitive members about new developments in the product category. This helps to better serve the Inquisitive customer and prospect. Offering this type of "better service" is believed to lead, over the long run, to more sales.

Third, sales reps conduct brainstorming sessions to share past experiences in identifying and selling to members in the Unhappy segment. Think of this as improving one's professional selling skills in order to motivate customers in this segment to give greater consideration to one's brand.

### A major barrier

In summary, the marketing literature and our experience strongly suggest that cognitive inertia is a major barrier to increasing a manufacturer's market penetration in some B2B markets. This article presents a case study that identifies factors influencing customer loyalty and inertia and segments customers on these two dimensions. Based on these findings, strategies are developed to more effectively position the company and its sales reps in marketing to members of the Inquisitive and Unhappy segments. Moreover, by identifying the least inertia-prone segments, organizations can more efficiently focus sales and marketing resources on customers who have the greatest likelihood of increasing the firm's market penetration.

Make no mistake about it, overcoming cognitive inertia in the B2B marketplace is difficult; however, by identifying and better understanding the factors that cause the inertia, marketers can nudge customers closer to their brand. 

David Soorholtz is managing director at Kleffmann North America Inc., a Des Moines, Iowa, research firm. He can be reached at david.soorholtz@kleffmann.com. Terry Grapentine is an independent marketing research consultant based in Ankeny, Iowa. He can be reached at tgrapentine@gmail.com.

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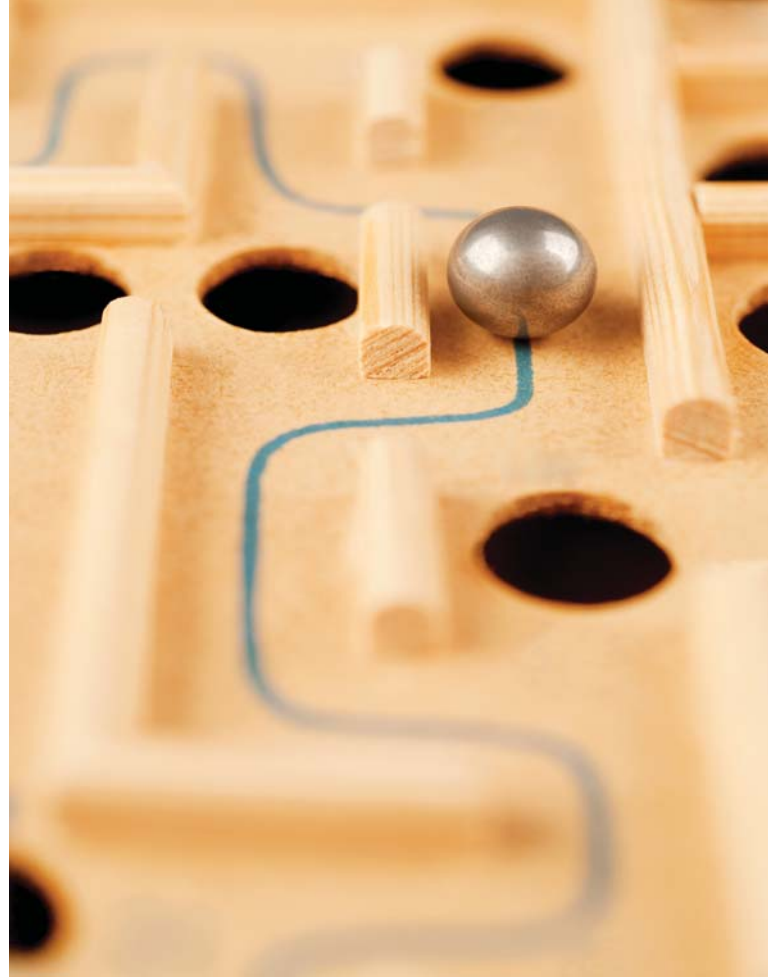
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# Leverage the irrational

How B2B marketers can use cognitive biases to their advantage

| By Adam Jones



## snapshot

Adam Jones looks at three forms of bias – prejudicial, contextual and experiential – and how they affect B2B marketing and customer decision-making.

The idea of the robotically rational and emotionless human has been played out in sci-fi movies to great effect over the past couple of decades. Naturally it is possible to push these boundaries further on the big screen than in real life, yet the common assumption by marketers (and for the most part the general public) is that humans are meant to be rational beasts. However, could any marketer honestly say that this is truly the case?

The study of behavioral economics provides an illuminating window into why this is not the case. While humans may believe they behave and think rationally, they are hampered by universally common and naturally-occurring cognitive biases – even in the case of business decision-making.

This article aims to serve as an introductory guide into the world of cognitive bias and how business-to-business marketers can begin to combat or leverage these irrational aspects of human psychology for greater marketing gains.

### Prejudicial bias

**The theory:** Status quo bias

**What it is:** Inertia. People prefer the brand/provider they know, even though it might not be the best solution for their needs.

**Summary:** People do what they have always done.

**A practical example of the irrational at play:** A business sticks with a desktop printer brand as it's the brand it has always used and the only brand it knows much about. Plus, it hardly ever thinks about switching, even though other brands could better meet its needs.

**Considerations for B2B marketers:** Try and break the inertia by increasing brand awareness, such as through an increase in communications, more impactful marketing, etc.; and developing more compelling customer value propositions to encourage people to switch, e.g., incentives, better communicating the ROI (increased productivity, etc.). Make sure market



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research examines past behaviors as these usually provide more reliable insights than hypothetical questions on future intentions.

**The theory:** Loss aversion

**What it is:** Preference for a current supplier for fear of suffering a loss in switching, versus achieving a gain from a new provider.

**Summary:** People with money won't bet the farm.

**A practical example of the irrational at play:** A frequent airline flyer sticks with their current airline so as to avoid losing their frequent flyer status and benefits, even though they could get more benefits (better fares, more points, more rewards, etc.) by switching airlines.

**Considerations for B2B marketers:** Consider helping customers with the switching process, e.g., integrating software, training on new equipment, minimizing downtime through temporary resources, offering money-back guarantees to alleviate concerns, etc. Strengthen the customer value proposition by better demonstrating the benefits of switching (ROI, improved productivity, etc.).

**The theory:** Sunk cost effect

**What it is:** The tendency to continue investing money/time/effort in a product or service even though it is failing expectations, meaning the emotions behind not giving up outweigh the logic of doing so.

**Summary:** People won't give up when it is obvious the idea is a bad one.

**A practical example of the irrational at play:** A business that has engaged with an IT services provider on an annual contract finds it harder to rationally decide whether service delivery is acceptable, compared to a business paying a fixed monthly cost. Despite the cost already having been incurred (and therefore irretrievable), the sunk cost still motivates future behavior.

**Considerations for B2B marketers:** Maintain a consistent level of engagement with customers and increase the number of potential touchpoints. Ensure there is a clear channel for customers to access relevant employees and internal

protocols to encourage employees to proactively reach out.

**The theory:** Endowment effect

**What it is:** The practice of paying more for a brand or product/service already used, versus switching to a new (and possibly cheaper) alternative.

**Summary:** The devil you know is better than the devil you don't know.

**A practical example of the irrational at play:** A construction company continues to use its incumbent supplier of aggregates, despite a competitor offering a better product. The fear of the unknown, coupled with the potential loss incurred from an error with the new product, enables the incumbent to command a premium.

**Considerations for B2B marketers:** Don't forget to continue building relationships with customers beyond the initial customer setup. These are customers likely to value your business more than new accounts, while being more open to paying a premium for service delivery. When bringing new products to market don't fear carving out a niche as opposed to going for wide appeal. You are going to have to work hard to convince people to switch so segmentation is key to successful marketing of new products.

**The theory:** Hyperbolic discounting

**What it is:** Preference for benefits in the immediate to short term versus in the longer term, based on a possibly false perception that it's better to be rewarded now rather than later.

**Summary:** A dollar now is better than two dollars tomorrow.

**A practical example of the irrational at play:** An insurance company offers payment plans that are charged every month, twice a year or once a year. Despite saving almost \$100 by choosing the lump sum annual payment, a small business would rather incur the smaller immediate charge.

**Considerations for B2B marketers:** Ensure that the immediacy of customer service is a key facet of relationship repair and issue resolution. Even if tokens are small (i.e., a phone call) they are reassuring if delivered soon after the issue is raised, rather than leaving the customer

guessing as to your response. To encourage supplier-switching, consider an upfront benefit such as a sign-on incentive or giveaway. The incentive doesn't have to require a significant financial outlay to be enticing (so long as the prospective customer sees value in the incentive) and likely can be recouped over the length of the relationship.

**Contextual bias**

**The theory:** Cognitive framing

**What it is:** The way in which information is presented, or the type of information presented, greatly influences decision-making and invokes more of an irrational response.

**Summary:** It is not what you say, it is how you say it.

**A practical example of the irrational at play:** A supplier of piping in the construction business realizes that its customer bases' expectations for delivery vary wildly. It realizes it can change its brand promise to make itself look more impressive, without altering customer perceptions of it. To raise appeal among prospective customers, it changes its brand promise from "90 percent of deliveries within 72 hours" to "98 percent of deliveries are on-time."

**Considerations for B2B marketers:** Don't fear going bold with any messaging. Emphasize product/cost benefits by the largest magnitude possible as these figures are most likely to impress. Be sure to focus marketing on the benefit to the customer, i.e., how your product can help to make your customers' business lives easier/more productive or to help them deliver better value, etc.

**The theory:** Anchoring

**What it is:** Presentation of preliminary information to deliberately bias the interpretation of other information that follows.

**Summary:** Put your best side forward.

**A practical example of the irrational at play:** An adhesives brand has developed a new product with the durability three times better than its previous incarnation. It realizes this is a strong marketing plan and plays on this fact as a key demonstration of innovation within the company. "Three times stronger than our previ-

ous adhesive” is used as the marketing tagline, as opposed to “Will serve you right for 72 hours.”

**Considerations for B2B marketers:** Ensure that pricing strategies are well-thought-out and researched. Once a price point is set it is difficult to raise it without a significant business case leading to profits being left on the table. Utilize a comparative marketing approach, using your competitors as a benchmark from which your product is improved (e.g., 50 percent larger than the nearest competitor).

**The theory:** Von Restorff effect/distinctive encoding  
**What it is:** Highlighting a particular element of a product or message, or presenting it in a novel way, to trigger an irrational response and drive brand/product recall.

**Summary:** When something stands out like a sore thumb.  
**A practical example of the irrational at play:** An electrical components brand organizes an annual robotics tournament where entrants must use the products it supplies in the robots built. This novel way for customers to use products, and the social occasion of the annual tournament, creates an emotional connection to the brand that traditional marketing platforms couldn't build.

**Considerations for B2B marketers:** Product differentiators should be pushed to create a wow factor. It is OK to play on a niche particularly when competing with brands with bigger marketing budgets. However, it is worth noting that being memorable isn't the only task of marketing but rather being memorable for something positive. Consider decluttering marketing materials and messages. A clear and distinct position, delivered in a clear style, will be more memorable than bombarding buyers with information. A well-thought-out and distinct CVP running through the company will aid this process.

### Experiential bias

**The theory:** Peak-end rule  
**What it is:** Judgment based on the most extreme point of an experience – especially at the end (be it positive or negative). The intensity of this

point invokes an irrational response which then clouds judgment.

**Summary:** You remember the last thing, not the first thing, that was said.  
**A practical example of the irrational at play:** A customer is becoming increasingly frustrated with their utilities supplier. After receiving another incorrect invoice they have begun to lose faith in their supplier. After contacting someone in customer service willing to go above and beyond to straighten out their issues, all is forgiven. This one piece of attentiveness with a particularly emotive customer provides a lot of goodwill toward the supplier moving forward.

**Considerations for B2B marketers:** Identify all potential customer touchpoints and ensure there are protocols in place for a seamless experience. Where there is the potential for issues, ensure a well-trained response is in place (e.g., a detractor management system or touchpoint survey). For particularly emotive aspects of the customer relationship (credit control/invoicing/collections) dedicate resources to deliver a quick response, even if only small.

**The theory:** Zeigarnik effect  
**What it is:** The pain of an incomplete task negatively biases a total experience or brand perception, therefore skewing the big picture.  
**Summary:** Painful experiences are

not forgotten.  
**A practical example of the irrational at play:** An online retailer decides to increase the number of complete interactions once a customer orders a product through its site. Instead of accepting the delivery and then ensuring that the product arrives, it first confirms receipt of the order, confirm that the product has left its warehouse, confirms that the product will be delivered in three-to-five business days and then ensures the product is delivered. The customer is kept in the loop on how the delivery is progressing while also experiencing many small, “complete” interactions with their supplier.  
**Considerations for B2B marketers:** Completing tasks for customers should be a key part of service delivery. Customer service/account management need to ensure issues are resolved, delivery staff need to ensure all orders are made in full, etc. Incompleteness leads to individuals/companies experiencing dissonance, which impacts on customer satisfaction and loyalty. Break down customer interactions into smaller chunks of “completeness” by increasing the number of touchpoints. ①

Adam Jones is analytics manager and is based out of research company B2B International's New York office. He can be reached at adamj@b2binternational.com.

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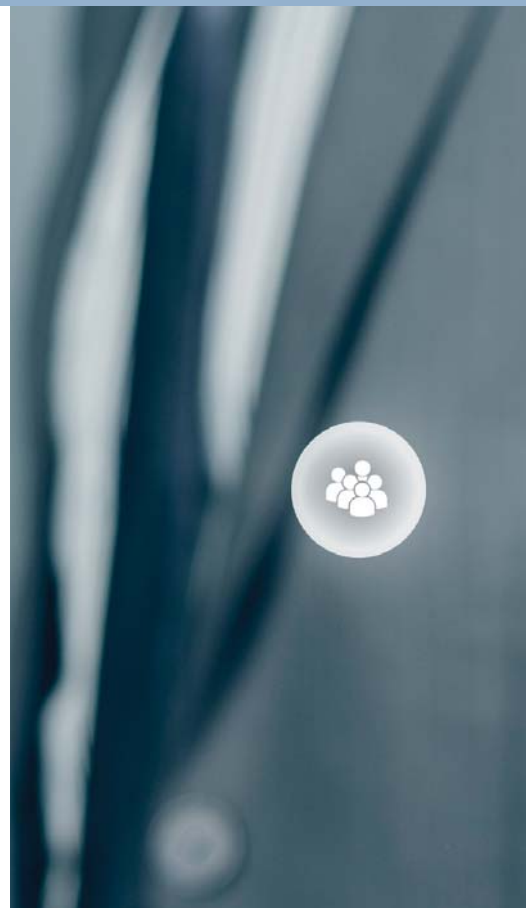
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Gary McMillion, CEO

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Founded 2008 | 475 employees  
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## Netquest

Founded 2001 | 230 employees  
Germán Loewe, CEO

Netquest is the No. 1 provider of opinion and digital behavior data in the market research sector in Latin America, Spain and Portugal. We count on more than 10 years of experience



creating representative panels of the population, being the only company in the region to be certified with the ISO 26362 standard, specific for online access panels. Thanks to our cross-device technology, we are the only company capable of offering integrated information about the consumer.

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# OMI

ONLINE MARKET INTELLIGENCE

## OMI (Online Market Intelligence)

Founded 2007 | 50 employees  
Dr. Alexander Shashkin, CEO

Online Market Intelligence (OMI) is a leading local provider of online fieldwork in Russia, Ukraine, Belarus and Kazakhstan. We have B2C, B2B IT, automotive, physician and patient panels exceeding 1 million people in total. We provide an opportunity for

Over 1 million panelists

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mobile research and have over 40,000 participants in our mobile panel in Russia. We also have more than 26,000 panelists in our Internet behavioral panel, which combines data of the real behavior in the Internet with panel profile data. OMI is the only ISO 20252- and 26362-certified company in the region.

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## Rare Patient Voice LLC

Founded 2013 | 6 employees  
Wes Michael, CEO

Rare Patient Voice recruits hard-to-find patients and caregivers for qualitative and quantitative market research. We attend patient events such as conferences and walks to build our panels

Why sign up with RPV?

- Provide your input to improve products and services.
- Help biopharma companies focus more on your rare disease.
- Earn rewards for participating in interviews and surveys.

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so that our patients are authentic and we can complete recruits within two weeks. We focus on recruiting only. Some of our panels include: all cancer types, Crohn's, cystic fibrosis, epilepsy, Gaucher, hemophilia, Huntington's, lupus, MPS diseases, multiple sclerosis, Parkinson's, pulmonary fibrosis, pulmonary hypertension, sickle cell, Sjogren's and spinal muscular atrophy. For cancer we have stage. For non-cancer we have medication used.

Phone 410-218-0527  
[www.rarepatientvoice.com](http://www.rarepatientvoice.com)



## Reckner Healthcare

Founded 1991 | 225 employees  
David Reckner, CEO



Reckner Healthcare provides the industry's most trusted online health care panel for pharmaceutical and medical marketing research projects. Leveraging an independently-maintained and -managed panel, Reckner specializes in delivering fast access to physicians, allied health care professionals, payers, hospital decision makers, opinion leaders, veterinarians, dentists and more across the United States and the world. With unparalleled project management and in-house technology teams, Reckner focuses on the details to ensure that your jobs run smoothly. Services include recruiting, list matching, pre-testing, project management, survey programming, data processing, tabulation, coding and online reporting. At Reckner, we deliver the best respondents for your research every time.

Phone 215-822-6220  
[www.recknerhealthcare.com](http://www.recknerhealthcare.com)





## Robas Research Private Limited

Founded 2012 | 25 employees  
Ankit Dhanuka, Director

Robas Research is a young and dynamic market research and insight agency which provides optimized outputs to advance and power our clients' current business. A full-service



market research firm in every sense of the term, we provide data collection services, project management and complete insight delivery. Whatever the desired output, its quality will always be unquestionable and will inspire the decisions you need to make. The team comes with extensive experience in multiple packages that are leveraged to support client needs. We believe in "Research from Base," which defines our firm's logo for any research/methodology in which it is conducted.

Phone +91-080-41229515  
www.ro-bas.com



## Schlesinger

Founded 1966 | 600 employees  
Matt Campion, Executive Vice President

Schlesinger has an unparalleled understanding of quality drivers across panel, sample and data. Rigorous and diverse methods are applied to recruit panelists and validate their registration and background data. Constant engagement and deep personal profiles allow us to build and maintain vertical panels across the U.S. and EU that promote higher motivation and targeted communication for our members. Our experts in panel aggregation provide access to a stringently vetted global network to support worldwide and longitudinal projects. Our panels are supported by the most innovative research software, integrated to optimize results. So whether for health care, consumer or B2B, you can be assured that your participants are on target, genuine and are not over-researched.



Phone 732-590-3110  
www.schlesingerassociates.com



## SoapBox Sample

Founded 2013 | 36 employees  
Jacqueline Rosales, Chief of Operations



From ideation to optimization, we conduct research for new product development, branding/advertising testing, creative optimization and concept/product testing. Leveraging a combination of in-house research capabilities, SoapBoxSample, a member of the ISA family of companies, is an all-encompassing market research firm focusing on the 360-degree view of the customer. Our offerings include: community insights platform (icanmakeitbetter), mobile research (geofencing, mobile missions and passive metering), data collection (online and traditional) and full research design and analytics.

Phone 855-SOAPBOX  
www.soapboxsample.com



## SSI (Survey Sampling International)

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

SSI is the premier global provider of data solutions and technology for consumer and business-to-business survey research, reaching respondents in 100+ countries via Internet, telephone, mobile/wireless and mixed-access of-

ferings. SSI staff operates from 30 offices in 21 countries, offering sample, data collection, CATI, questionnaire design consultation, programming and hosting, online custom reporting and data processing. SSI's 3,600 employees serve more than 2,500 clients worldwide. Visit SSI at [www.surveysampling.com](http://www.surveysampling.com).



Phone 203-567-7200  
[www.surveysampling.com](http://www.surveysampling.com)



## Symmetric, A Decision Analyst Company

Founded 2016 | 150+ employees  
Jason Thomas, President of Symmetric



Our worldwide Internet panels set the standard for quality and consistency. Our suite of double opt-in panels include American Consumer Opinion® - worldwide panel of over 7 million consumers; Physicians Advisory Council® - our panel of over 20,000 verified physicians and surgeons; Medical Advisory Board™ - worldwide panel of over 40,000 nurses, optometrists,

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pharmacists and other health care professionals; Executive Advisory Board® - worldwide panel of over 100,000 managers and executives; Technology Advisory Board® - worldwide panel of over 105,000 information system professionals; and Contractor Advisory Board® - worldwide panel of over 30,000 general contractors from all segments of the construction industry.

Phone 817-640-6166  
[www.symmetricssampling.com](http://www.symmetricssampling.com)



## Toluna

Founded 2000 | 1,200+ employees  
Frederic-Charles Petit, CEO



Toluna is a leading provider of real-time digital consumer insights and empowers companies to brainstorm ideas, uncover new business opportunities and answer their questions in real time. Toluna is transforming the way marketing decisions are made by bringing consumers and brands together via the world's largest social voting community of 9 million members across 49 countries. This real-time access to consumers is coupled with its state-of-the-art market research survey and analytics platform. Toluna has 18 offices in Europe, North America and Asia-Pacific.

Phone 203-834-8585  
[corporate.toluna.com](http://corporate.toluna.com)



## Turning Point Research

Founded 2014 | 10 employees  
James Medick, CEO

Turning Point Research is your go-to provider for all things in the Internet research realm. Whether you need sample provided, programming or even your own



proprietary panel built, Turning Point Research is the company for you. For 20 years, TPR's parent company has been bringing you quality research data from their phone room and now they are bringing it to you online. Contact us today to give your research the quality and care it needs. Visit us online at [www.turningpointresearch.com](http://www.turningpointresearch.com) or e-mail us today at [info@turningpointresearch.com](mailto:info@turningpointresearch.com).

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# Q

## Names of Note

■ In New York, media company *Univision Communications Inc.* has appointed **Jed Meyer** as executive vice president, corporate research.

■ *Microsoft* has appointed **Jolaine Boyd** as its new CMO for Asia-Pacific, based in Singapore.

■ Stockholm-based research firm *Cint* has appointed **Greg Dunbar** as vice president of sales, EMEA and **Dag Magni** as CFO. Also, **Richard Thornton**, chief commercial officer, has been promoted to deputy CEO.

■ In London, **Charles Pearson** has joined research firm *FlexMR* as SVP, strategic business development.



Pearson

■ *Monsanto Company*, St. Louis, has appointed Nielsen CEO **Mitch Barns** to its board of directors. His appointment is effective immediately and he will stand for election to the board at the 2017 annual meeting of shareowners. He will serve on the science and technology committee and the sustainability and corporate responsibility committee.

■ In New York, consumer products company *Colgate-Palmolive* has appointed the following: **P. Justin Skala** as COO, North America, Europe, Africa/Eurasia and

global sustainability; **Noel R. Wallace** as COO, global innovation and growth and Hill's Pet Nutrition, including leadership of the company's global marketing, research and development, global manufacturing and customer development organizations and **Franck J. Moison** as vice chairman overseeing the company's business in Asia-Pacific and Latin America and its business development efforts. **Fabian T. Garcia**, formerly COO, global innovation and growth, Europe/South Pacific and Hill's Pet Nutrition, announced his departure from Colgate to assume a leadership role outside the company.

■ Research firm *Firefish* has appointed **Beth Broughton** as managing director of its U.S. business, based in Brooklyn, N.Y.



Broughton

■ **R. Dennis Wildsmith**, most recently vice president of risk operations for Dallas-based money transfer provider *Moneygram International*, has been named executive director of *The Joseph School*, a college-prep school based in Cabaret, Haiti, and Nashville, Tenn. The school was launched in 2011 by Nashville, Tenn., firm *20/20 Research* and its founder/CEO **Jim Bryson** following the 2010 earthquake in Haiti. The school opened last September with 31 students and five teachers. Wildsmith will be based in Nashville but will spend a portion of his time in Haiti.

■ San Francisco-based cloud analytics platform *Keen IO* has hired **Will O'Brien** as COO.

■ Portsmouth, N.H., online research panel *Op4G* has appointed **Don Wasylyk** as technology systems manager based in the firm's Austin, Texas, office.

■ Irvine, Calif., firm *MFour Mobile Research* has hired **Eric Chou** as software engineer.

■ Research company *Mozaic Group* has appointed **Vaishali Daga** as analytics director.

■ In Atlanta, research firm *CMI* has appointed **Will Leopold** as senior

research manager for its Healthcare and Life Sciences team.

**Dave Williams** has rejoined the firm as manager of technology services.



Williams

■ India-based online panel services firm *Borderless Access* has appointed **Arindam Som** as a non-executive director responsible for contributing to the insights and innovation at the firm and **Steve Hamilton Clark** as a non-executive director for the Middle East region.

■ San Francisco application intelligence company *AppDynamics* has appointed **Kendall Collins** as CMO.

■ **Alan M. Park** has joined Waltham, Mass., emotion recognition software firm *Affectiva* as its chief revenue officer.

■ *Disney/ABC Television Group*, Burbank, Calif., has named current ABC Research executive **Elizabeth Sloan** and **Jane Gould** to the newly-created positions of senior vice president, consumer insights, for the group's broadcast/studio and cable teams, respectively. Sloan will lead all consumer insights, research and analytics functions across ABC Entertainment, ABC Studios and ABC News. Gould will oversee all consumer insights, research and analytics functions across the group's four cable networks – Disney Channel, Disney Junior, Disney XD and Freeform – as well as Radio Disney. In addition, she



[quirks.com/articles/2016/20160611.aspx](http://quirks.com/articles/2016/20160611.aspx)

will provide guidance for and collaboration with research partners at Disney Channels around the world.

■ **Consensus Point**, a Nashville, Tenn., provider of prediction market research technology, has appointed **Bart Gamble** as vice president, client service and analytics, effective immediately.

■ **Michael W. Link** has been named president and CEO of **Abt SRBI**, a research firm and subsidiary of Cambridge, Mass., researcher Abt Associates. Link is the past president of the American Association for Public Opinion Research.

■ New York-based researcher **SHC Universal** has hired **Rachel Knowles** as director, joining the firm's London-based team. SHC Universal has also named **Jerry Arbittier** as its new CEO.

■ **Mike Boehm** has joined Irvine, Calif., firm **MFour Mobile Research** as director of communications.

■ San Francisco-based **Grand View Research Inc.** has appointed **Bhabesh Panigrahi** as director of strategy and research.

■ In New York, researcher **Ipsos** has appointed **Joe Marshall** as president of Ipsos Marketing Quantitative in the U.S. He will be based in Chicago.

■ U.K. video research technology company **Voxpopme** has appointed **Brin Moore** as VP of sales for North America.

■ **Lightspeed GMI**, based in Warren, N.J., has expanded its Latin American business led by **Luis Martin**, senior account director, and Account Director **Benjamin Huston**, with teams operating in Mexico City and São Paulo. The firm has also added **Jose Vanderley**, senior project manager, to its Latin America team.

■ **Celebrity Cruises**, operated by Miami-based cruise vacation company Royal Caribbean Cruises Ltd., has named **Peter Giorgi** as CMO.

■ **MTV**, a unit of New York-based Viacom, has named **Laurel Weir** as senior vice president, strategic insights and research.

■ **Natasha Hritzuk** has joined the research division of Atlanta-based media company **Turner** as vice president of client insights and content partnerships research. She will be based in New York.

■ New York-based research consultancy **Millward Brown** has appointed **Louise Ainsworth** as CEO of Millward Brown in the U.K. She will replace **Dale Beaton**, U.K. managing director, who is moving to the role of SVP global practice lead, Millward Brown.

■ **Sylvain Gauthier** has joined Canada-based research and polling firm **Leger** as vice president of research for its Quebec City office.

■ **UK Online Measurement Company**, the industry body owned by the Internet Advertising Bureau and Association of Online Publishers, has appointed **Julie Forey** as its first director of insight.

■ In Atlanta, researcher **Focus Pointe Global** has appointed **Todd Napier** as chief business development officer.

■ **RealityMine**, a U.K. mobile research technologies and consumer analytics firm, has named **Tom O'Sullivan** as chief revenue officer.

■ Nuremberg, Germany, research firm **GfK** has reported that **Wolfgang C. Berndt**, **Bernhard Düttmann**, **Hauke Stars** and **Hans van Bylen** will leave the firm's supervisory board. Additionally, at the request of GfK Verein, GfK's majority shareholder, the supervisory board has nominated **Dieter Kempf**, former CEO of DATEV eG, members of the executive board of GfK **Verein Ralf Klein-Bölting** and **Raimund Wildner**, as well as **Bruno Piacenza**, a member of the management board of Henkel Management AG, for election. Changes to the board have been anticipated since last year, with Berndt announcing upon his reelection that he would resign from the



Gauthier



Napier

supervisory board in light of the maximum tenure laid out in the corporate governance codex. In addition, Stars informed GfK at the end of last year, as did Düttmann more recently, that he would resign before completion of his term. Van Bylen, who is to become CEO of Henkel Management AG, informed GfK at the end of March that he too would resign, effective April 30.

■ Research firm **TNS UK**, London, has appointed **Richard Clissold-Vasey** as COO, with a place on the U.K. board.

■ **Martine Reardon**, CMO for Cincinnati-based retailer **Macy's**, left the company in May after 32 years of service.

■ **Alan Mavretish** has joined **Schlesinger Interactive** as vice president, client development. He will be based in Pittsburgh.



Mavretish

■ In Chicago, customer science company **dunnhumby** has hired **Rob Christian** as senior vice president of business development.

■ New Orleans-based audience platform **Lucid** has appointed **Ben Hogg** as managing director, EMEA. He will be based in the firm's London office. Additionally, the firm has announced new titles for two senior executives: **Andy Ellis**, president of Lucid's Fulcrum and Federated Sample business units, has been named chief operating officer, Lucid and **Brett Schnittlich**, Lucid's chief technology officer, has been named president and CTO, Lucid.

■ New York indoor cycling company **Peloton** has named **Lori Marcus** as its new CMO.

■ Sweden-based research company **Nepa** has added **Bo Mattsson**, founder of Sweden-based research company **Cint**, to its board of directors.

■ **Betsy Bergman** has joined **NBCUniversal TV Distribution**, New York, as senior vice president, marketing and brand strategy.

# Q

## Research Industry News

### News notes

■ On April 1, New York researcher **Focus Plus** marked 30 years in business.

■ Boston-based firm research firm **InCrowd** has issued the one-millionth answer from its 1.8 million-member clinical "Crowd" of physicians, nurses, pharmacists and managed care experts to companies who use InCrowd to obtain business insights. The physicians and clinicians contribute their insights as a service to the life sciences companies that work with InCrowd by answering companies' business, regulatory and product questions.

■ Bloomington, Minn., research company **Information Specialists Group** celebrated 20 years of business on April 2. The firm says its next phase includes office expansion to add to its data collection capacity, along with a more formal training facility.

■ Netherlands-based research software firm **Nebu** and the **University of Debrecen** in Hungary have agreed to establish the Nebu Scholarship for IT students. Students will have the opportunity to participate in a research project during the summer, supervised by specialists from both Nebu and the university.



[quirks.com/articles/2016/20160612.aspx](http://quirks.com/articles/2016/20160612.aspx)

■ **Synergistics Research Corp.**, Atlanta, celebrated its 35th anniversary on April 1.

■ **The Research Partnership Inc.** (TRP), a research firm in Wichita, Kan., is on the market after 33 years in operation. TRP and its facility are for sale by owners and founders Bob Ross and Esther Headley.

■ Irvine, Calif., firm **MFour Mobile Research** has boosted its active-panel size to more than 1 million. Since January, 198,000 new panelists have signed up for the firm's Surveys on the Go application, putting it past the million-member milestone.

■ **ComScore**, Reston, Va., has been granted accreditation by the **Media Rating Council** (MRC) for its Audience module of validated Campaign Essentials 2.0 (vCE 2.0), which includes its reporting of digital campaign age, gender and behavior-based ethnicity demographics and the resulting reach, frequency and GRPs. Both the vCE 2.0 Audience and Validation modules are now accredited. ComScore is the first company to offer an MRC-accredited viewable GRP for desktop display and video campaigns, which removes non-viewable and invalid impressions from GRP calculations.

### Acquisitions/transactions

■ New York visual content marketing platform **Olapic** has acquired **Piqora**, a firm focused on marketing and data analytics for Pinterest. Financial terms of the deal were not disclosed. Piqora's technology will be integrated into the Olapic visual content marketing platform. As part of the acquisition, Piqora's San Mateo, Calif., operations and team will be merged into Olapic. Olapic is now a Marketing Developer Partner of Pinterest and offers content pub-

lishing for Facebook, Instagram and Pinterest.

■ Raleigh, N.C., firm **L&E Research** has continued its expansion with the recent acquisition of **Focus Market Research** in Minneapolis.

■ U.K. professional services firm **MARU Group** has closed the transaction to acquire **Vision Critical Research and Consulting**, the North American spin-off research consulting division of Canada-based customer intelligence firm Vision Critical. The new business will operate as a stand-alone entity within MARU Group as maru/vcr&c under the leadership of the current Vision Critical Research and Consulting executive team. All current Vision Critical Research and Consulting employees will retain their roles in the new independent company and continue to serve all existing customers. Following the transaction, maru/vcr&c will work in collaboration with Vision Critical via a value-added reseller and strategic partnership agreement, including the continued support by the Vision Critical Research and Consulting team in managing future community-powered research projects.

■ San Bruno, Calif., cross-platform e-commerce provider **Astound Commerce** has completed its acquisition of Chicago-based e-commerce consultancy the **e-tailing group**.

■ **IBM Watson Health**, Armonk, N.Y., has completed its \$2.6 billion acquisition of **Truven Health Analytics**, an Ann Arbor, Mich., cloud-based health care data, analytics and insights provider.

■ Germany-based panel provider **respondi** has purchased France-based research, data science and IT company **House of Common Knowledge**, allowing respondi to expand its

services and products to include data science, IT solutions and the corresponding consulting skills.

■ Concord, Mass., retail analytics firm **ShopAdvisor** has acquired Redwood City, Calif., in-store product data and location services firm **Retailgence**.

■ London-based investment firm **XIO Group** will acquire Costa Mesa, Calif., researcher **J.D. Power** from McGraw Hill Financial Inc. for a purchase price of \$1.1 billion. The parties have entered into a definitive agreement and anticipate that the transaction will close during the third quarter of 2016, subject to customary closing conditions. Upon closing, XIO Group will support J.D. Power's existing management team and employees in expanding the company's market share.

■ London researcher **TNS** has acquired all remaining shares in **Taylor Nelson Sofres ICAP Market Research SA** (TNS ICAP), a research agency based in Greece. The acquisition increases TNS's stake in TNS ICAP from 51 percent to 100 percent.

■ Canada-based mobile customer engagement firm **Mobify** has acquired **Pathful**, a Canada-based provider of machine learning-based technology for behavior-based targeting. Terms were not disclosed. Pathful's team has joined Mobify, including co-founders Boris Lau as senior software engineer and Campbell Macdonald as an advisor.

### Alliances/strategic partnerships

■ Santa Clara, Calif., social analytics firm **NetBase** has partnered with American Fork, Utah, data analytics provider **Domo** to integrate data from NetBase's social analytics platform with Domo's cloud-based platform.

■ Commercial **Radio Malaysia**, an association of commercial radio operators, has made Nuremberg, Germany, firm **GfK** a research partner, allowing GfK to provide advertis-

ers and media buyers with insights into the listening habits of local radio listeners. GfK will use a combined methodological approach for the study in Malaysia, with two waves of surveys that will be conducted per year among 12,000 representatively-selected radio listeners in Malaysia. The respondents will log their radio usage over seven days, with 80 percent responding via a paper diary and 20 percent via an electronic diary. To analyze the obtained data, GfK will use its own software solution that enables broadcasters and advertisers a strategic program and media-planning tool.

■ U.K. customer science company **dunnhumby** and **Facebook**, Menlo Park, Calif., have formed a partnership to help FMCG brands better measure the effectiveness of campaigns on Facebook across U.K. households, specifically whether they drove in-store and online sales, using the dunnhumby Sales Impact solution. The dunnhumby and Facebook data sets will be matched while respecting data privacy using a safe haven developed by marketing technology company Acxiom that enables anonymized matching and analytics. Through the use of this safe haven, the data used cannot be attributed to an individual user or household. Eight FMCG companies have been involved in pilot-testing for the new solution, measuring 10 well-known household brands from a range of categories including soft drinks, laundry detergent, confectionery, personal care and beers, wines and spirits.

■ New York media and entertainment company **Time Warner Inc.** has formed a three-year strategic partnership with **Nielsen**, New York, and the Time Warner Medialab, a facility that comprises technologies and research techniques to generate insight into consumer behavior. Nielsen will leverage the Medialab's capabilities to evaluate how the modern consumer reacts and responds to various forms of media content and advertising. The deal will build on the Medialab's existing neuroscience capabilities including biometric and eye-tracking technology and bring enhanced

facial coding, behavioral coding and EEG technology to allow Nielsen to capture a variety of engagement measures to simulated viewing and purchase experiences. The goal of the partnership is to reveal insights into the non-conscious and conscious aspects of the consumer experience and decision-making process.

■ Anacortes, Wash., consulting firm **Shainin** has selected Lexington, Ky., research and consulting firm **Photizo Group** as its partner for providing predictive analytics solutions to Shainin clients.

■ Provo, Utah, survey platform **Qualtrics** and **iModerate**, a Denver-based research firm, have formed a partnership to allow organizations to get insights from customer feedback. Mutual clients will be able to utilize iModerate's moderated one-on-one conversations to augment feedback obtained from Qualtrics' technology and insight platform.

■ **Nielsen**, New York, and e-commerce analytics company **Profitero**, Boston, have formed a strategic alliance, making Profitero's Digital Shelf 360 solutions available for Nielsen clients. Together, the two firms allow consumer packaged goods companies to correlate online performance with actual sales data.

■ Rockville, Md., market intelligence distributor **MarketResearch.com** has formed a business partnership with New York researcher **Beige Market Intelligence**, allowing for the marketing and distribution of Beige Market Intelligence's proprietary market analyses through the MarketResearch.com site.

■ Singapore-based audience data firm **Eyeota** and **Kantar Media**, London, have formed a data partnership, beginning first in the U.K. The first phase of the partnership gives advertisers and media buyers in the U.K. access to predefined segments built from Kantar Media's TGI study of consumer behavior and characteristics, allowing them to target specific audiences for online advertising.

■ **Facebook**, Menlo Park, Calif., has added **Nielsen**, New York; **com-Score**, Reston, Va., and **Integral Ad Science**, New York, to its list of ad verification partners. The firms will verify ad viewability and attention metrics for photo and video ads on Facebook, offering more advertisers the transparency needed to trust their ad delivery data.

■ Canada-based firm **360insights**, which recently launched its Channel Success Platform for predictive analytics, has engaged research industry consultant **Kristin Luck**. She will assist the company in leveraging the new platform capabilities to help clients make business and marketing decisions.

### Awards/rankings

■ Jupiter, Fla., research firm **Quick Test/Heakin** announced that it was a contributing agency to two **Shopper Marketing Effie** (SME) Awards, which were presented at the Path to Purchase Institute's Shopper Marketing Summit Awards Celebration in March. In the Multi-Brand Shopper Solution category, **Walmart** and **Starcom MediaVest Group** won a Silver SME for "Chosen by Kids," along with contributing agencies **Shopper Events**, **The Martin Agency**, **OneKreate** and **Quick Test**. And in the Seasonal/Event category, **Walmart** and **Starcom MediaVest Group** won a Gold SME for "Chosen by Kids," with contributing agencies **Shopper Events**, **The Martin Agency**, **OneKreate** and **Quick Test**. **Quick Test** provided respondent recruiting, event staffing and management for the event, interviewing 1,000+ children for the kid-curated Top Toys list.

■ Indianapolis-based customer experience consulting firm **Walker** was named a winner in the **2016 Customer Experience Vendor Excellence Awards**. The award recognizes firms that help other companies improve their customer experience.

■ Salt Lake City customer experience company **MaritzCX** has been

named a winner of a **2016 Temkin Group Customer Experience Vendor Excellence Award**. **Temkin Group**, a customer experience research and consulting firm, instituted the award program to recognize the providers of products and services that help organizations improve customer experience outcomes.

■ The **USC Annenberg School for Communication and Journalism**, Los Angeles, has selected **Robert V. Kozinets**, an expert in marketing research, strategy and social media, as the **Jayne and Hans Hufschmid Chair in Strategic Public Relations and Business Communication**. The **Hufschmid Chair** is designed to provide academic and research leadership focusing on the intersection of business and communication. **Kozinets**, who will hold a joint appointment with the **USC Marshall School of Business**, will create new classes and programs on the evolution of media and strengthen the connections among digital communications, networks, brands and entertainment.

### New accounts/projects

■ **ComScore Inc.**, Reston, Va., has formed a new long-term agreement with **DISH Network**, Englewood, Colo., to renew its integration of **DISH's** TV viewing information with **comScore's** TV measurement service. The integration of **DISH's** aggregated and projected TV viewing with **comScore's** services is designed to provide the industry with more dynamic measurement and holistic reporting. **ComScore** provides **DISH** with an internal system to make programming, marketing and advertising decisions. **ComScore** also helps **DISH** measure addressable campaigns, with the goal of allowing brands to deliver more relevant messages to viewers. Separately, **Nielsen**, New York, has entered a multi-year agreement with **DISH** under which data provided by **DISH** will be integrated into **Nielsen's** Local TV measurement service across all 210 designated market areas. The agreement will also enable **Nielsen** to leverage **DISH's** set-top-box data to complement many

of its local and national products and multiple national insight services. Additionally, **Nielsen** will also have the ability to use set-top-box data for its suite of marketing effectiveness and return on ad sales solutions, including **CPG**, retail and auto.

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

■ Denver-based firm **Resolution Research & Marketing Inc.** has opened a new focus group facility in Denver.

■ Atlanta public relations and digital communications agency **Hope-Beckham Inc.** has launched its market research group. The research offerings include digital personas, customer journey mapping, focus groups and group studies, affinity interest mapping, hot topic heat maps, secret shoppers and online surveys.

■ U.K. firm **Keen as Mustard Marketing** has moved to a new office in the **Vauxhall** district of central London.

■ Canada-based market research data collection firm **The Logit Group** has undergone a rebrand and has opened a new 115-seat call center in **Wichita, Kan.**

■ **Cambiar Consulting**, Pennington, N.J., has opened a new technology and analytics office and practice in **Palo Alto, Calif.**, to be led by **Richard Scionti**, who has joined the company as a full partner.

■ After separating from **eBay Inc.** in November, **eBay Enterprise Marketing Solutions**, **Wilkes-Barre, Pa.**, has rebranded as **Pepperjam**. **Michael Jones**, who served as general manager, now leads **Pepperjam** as CEO. **Pepperjam** provides technology and services including **The Pepperjam Network**, affiliate marketing management, analytics and insights, content and design, display advertising, search marketing and social marketing.

■ **Palo Alto, Calif.**, technology research and advisory firm **Aragon**



**Research** is launching a new consulting practice focusing on digital business and transformation. Aragon is partnering with Practically Digital, a Chicago-based technology consulting firm which specializes in digital strategy, innovative technology solutions, cognitive computing and IT due diligence and mergers support.

■ **Omnicom Media Group**, the media services division of New York-based marketing communications company Omnicom Group Inc., has launched its third agency network, Hearts & Science, a data-driven marketing agency with media planning and buying capabilities, among other services that include shopper marketing, marketing innovation and content activation. Hearts & Science has opened its North America-based operation with Procter & Gamble as its inaugural client and Scott Hagedorn as its CEO.

■ In London, a group of communications measurement professionals have launched **The Measurement Practice**, a virtual consultancy created to help in-house and agency communications teams use the right research data to inform decision-making and help meet key business objectives. The consultancy offers three core services: program auditing and alignment, training and workshops and supplier identification. The associates within the practice include Mike Daniels (business and communications), Colin Wheeler (research and integration), Liam Kelly (media analysis and insight), Pat Molloy (analytics, insight, data mining and technology solutions) and Guy Corbet (communications and strategy).

■ Chalfont, Pa., researcher **Reckner**, owner of The Institute for Sensory Research and Reckner Facilities, has opened a sensory and product testing facility in Harrison, N.Y.

■ London-based **Basis Research** has opened its first U.S. office, in Los Angeles, to be led by Kate Hartzell.

■ Information services company **Experian** has expanded its DataLabs

in North America by opening a new facility in the San Diego, Calif., area. The new facility will be outfitted with beacons, biometrics and emerging technologies.

■ Piscataway, N.J., data collection agency **Azure Knowledge Corporation** has opened two new offices in Sao Paulo and Moscow. Ernest Khodzhaev will serve as country manager for Russia and Danielle Ribeiro de Souza will serve as country manager for Brazil. The firm also has further plans to expand its footprint in China.

■ Bristol, Pa., research and consulting firm **BioVid Corporation** has developed a new Business Development and Licensing division devoted to offering business solutions for business development and licensing professionals in biopharma. The firm's team of decision scientists has also developed a proprietary platform, DemandDefender BD&L, which delivers a market assessment for each stage of the acquisition process. The division will be headed up by Gary Schwebach as executive director.

### Research company earnings/ financial news

■ Belgium-based consumer collaboration agency **InSites Consulting** has reported revenue growth of more than 20 percent throughout this fiscal year and anticipates to close the fiscal year (June 30, 2016) with €23 million in revenues or a 30 percent organic growth. Its four client-facing offices based in Ghent, Belgium; Rotterdam, Netherlands; New York and London amount for approximately 40 percent, 30 percent, 20 percent and 10 percent of corporate revenues, respectively.

■ U.K. research company **Join the Dots** has reported a year-on-year increase in revenue of 27 percent, with the company's revenue hitting £7.75 million in 2015.

■ Cloud-based customer insight and personalization software provider **ciValue**, based in Israel, has closed a \$2.4 million seed round

from Nielsen Innovate, Mac Fund, a Korean-Israeli fund, Deutsche Telekom and other investors to support the rollout of its cloud-based, self-service customer analytics and personalization solution for grocery, health and beauty retailers.

■ **Study Hall Research**, Tampa, Fla., reported that quarterly revenues increased by 32.2 percent versus the same period one year ago. For the same time period, the company noted that contracted client engagements for the first quarter occurred at a rate of more than one per week for the entire quarter. The company posted its strongest Q1 revenues since it was founded in 2010.

■ **Nielsen**, New York, reported its first-quarter 2016 results and also announced that its board of directors approved an increase in the company's quarterly cash dividend of 11 percent to \$0.31 per share. Revenues were approximately \$1.5 billion for the first quarter of 2016, up 2.0 percent or 5.2 percent on a constant currency basis, compared to first-quarter 2015. Adjusted net income for the first quarter of 2016 of \$187 million was up 8.1 percent or 9.4 percent on a constant currency basis, as compared to the first quarter of 2015. Adjusted net income per share on a diluted basis grew 10.9 percent to \$0.51 for the first quarter of 2016, compared to \$0.46 in the first quarter of 2015. Net income for the first quarter of 2016 increased 60.3 percent to \$101 million or 62.9 percent on a constant currency basis, compared to the first quarter of 2015.

■ Boulder, Colo., marketing automation firm **TapInfluence** has closed \$14 million in financing led by Noro-Moseley Partners with participation from existing investors Grotech Ventures and Access Venture Partners, as well as new investor Knollwood Investment Advisory. Contributions were also made from MergeLane, a start-up accelerator for women-led companies and super angel Robin Ferracone, founder and CEO of Farient Advisors. The firm plans to double its headcount by year's end and open additional offices.

# CALENDAR OF EVENTS

●●● can't-miss activities

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

**MRIA** will hold its annual conference on **June 1-3** at Fairmont the Queen Elizabeth in **Montreal, Quebec.** Visit [mria-arim.ca](http://mria-arim.ca).

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

**NorthWest MRA** will hold its Annual Education Conference on **June 2-3** at The Allison Inn & Spa in **Newberg, Ore.** Visit [northwestmra.events](http://northwestmra.events).

**ESOMAR** will hold its Summer Academy 2016 on **June 5-9** in **Amsterdam.** Visit [www.esomar.org](http://www.esomar.org).

**CASRO** will hold its annual Technology and Innovation Event on **June 6-7** in **New York City.** Visit [www.casro.org](http://www.casro.org).

**Intengo** will host a Webinar, titled "It CAN Be Fun and Games: How to Use Social Prediction, Game Thinking and Crowd Wisdom to Discover Fresh Ideas to Invigorate Your Business," on **June 6** at 1:00 p.m. CST. Visit [bit.ly/23mqZnf](http://bit.ly/23mqZnf).

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

**The Pharma CI Asia Conference and Exhibition** will be held on **June 14-15** at the Kowloon Shangri-La Hotel in **Hong Kong.** Visit [pharmaciconference.com](http://pharmaciconference.com).

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

**The 2016 Canadian Pharma Market Research Conference** will be held on **June 22-23** at the Hyatt Regency Toronto in **Toronto.** Visit [canada.pharmamarketresearch.conference.com](http://canada.pharmamarketresearch.conference.com).

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

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

**AMA** will hold its 2016

Advanced Research Techniques (ART) Forum on **June 26-29** at the Westin Copley Place in **Boston.** Visit [www.ama.org](http://www.ama.org).

**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](http://www.digitalcustomerexp.co.uk).

**The Merlien Institute** will hold its MRMW North America conference on **July 18-19** in **Fort Worth, Texas.** Visit [na.mrmw.net](http://na.mrmw.net).

**IQPC** will hold its 5th Annual Customer Insight and Analytics Summit on **August 22-24** in **Austin, Texas.** Visit [bit.ly/1qk233M](http://bit.ly/1qk233M).

**The Australian Market and Social Research Society** will hold its National Conference on **September 8-9** at the Grand Hyatt in **Melbourne, Australia.** Visit [www.amsrs.com.au](http://www.amsrs.com.au).

**The Strategy Institute** will hold its Third Annual Digital Customer Experience Strategies Summit on **September 13-14** in **Chicago.** Visit [www.digitalcustomerexp.com](http://www.digitalcustomerexp.com).

**The Merlien Institute** will hold its MRMW Europe conference on **September 14-15** at the Millennium Hotel Mayfair in **London.** Visit [eu.mrmw.net](http://eu.mrmw.net).

**Richmond Events** will host The Market Insight Forum USA on **September 15** at the Harvard Club in **New York.** Visit

[us.marketinsightforum.com](http://us.marketinsightforum.com).

**ESOMAR** will hold its annual Congress on **September 18-21** in **New Orleans.** Visit [www.esomar.org](http://www.esomar.org).

**MRA** will host the Corporate Researchers Conference on **September 26-28** at The Westin St. Francis San Francisco on Union Square in **San Francisco.** Visit [www.marketingresearch.org](http://www.marketingresearch.org).

**The Strategy Institute** will hold its 3rd Annual Digital Customer Experience Strategies Summit on **September 21-22** in **Chicago.** Visit [www.digitalcustomerexp.com](http://www.digitalcustomerexp.com).

**Sawtooth Software** will hold its Sawtooth Software Conference 2016 on **September 26-30** in **Park City, Utah.** Visit [sawtoothsoftware.com/training/conferences](http://sawtoothsoftware.com/training/conferences).

**NMSBA** will hold its Shopper Brain Conference - Europe on **October 20-21** at Hotel Casa400 in **Amsterdam.** Visit [www.shopperbrainconference.com/amsterdam](http://www.shopperbrainconference.com/amsterdam).

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

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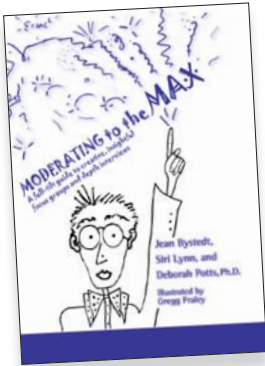


  
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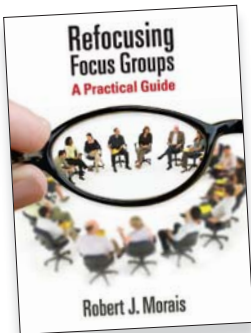
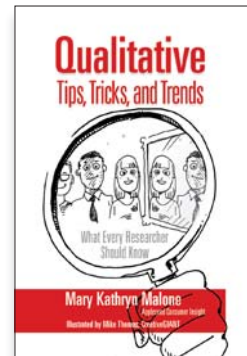
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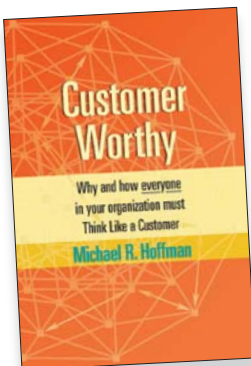
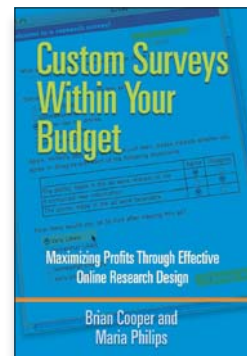
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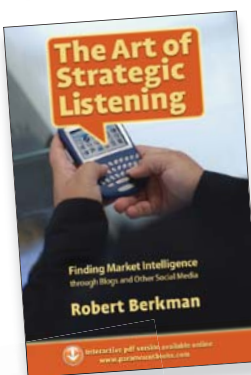
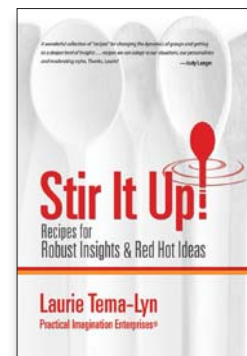
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## 10 minutes with...

**Larry L. Musetti**

*Market Research Manager, Benjamin Moore & Co.*

### **What change in the MR industry has affected you the most throughout your career?**

In short, PowerPoint and the Internet.

PowerPoint forced me to write shorter headlines and one or two graphics per slide instead of writing long – and typically unread – cursive reports with lots of words, numbers, stat testing and sample sizes. PowerPoint is both a curse and a blessing. It made me focus on five-to-nine bullet points. Executives love PowerPoint and what has evolved into infographics. They no longer have time nor want to know about the how and why, or even the possibilities of market research. Execs trust I'm doing the market research right – they need me to understand the business issues and whittle down all the data and statistics into a concise set of customer insights to help them make decisions here and now.

The Internet has affected everything. My best overall market research job was with an Internet start-up market research supplier. The early days were extremely challenging and rewarding, breaking new ground almost every day. It was a lot of fun! Before the Internet, there was an old saying in market research that you can only have two of three things – fast, accurate or cheap. With the Internet I now have all three! Data collection is affected the most. The days of mail panels are long gone. I never do mail surveys anymore, except to deliver products on IHUTs. Phone interviews are becoming outdated with the decrease in home phones and the increase in mobile, Wi-Fi sensors and beacon technology. Questionnaires are now shorter and more engaging to gain stronger cooperation and response rates. The days of matrix questions with long attribute rating questions are numbered. Social media, observation and virtual reality methodologies are becoming more common when collecting and interpreting customer attitudes and behaviors.

### **How have you used video and infographics to communicate research insights?**

Video beats PowerPoint hands down! I recently conducted a series of business ethnographies. It was the best work that I've done in my career. Video made these ethnographies come to life and it was a huge success on all levels, from the CEO and C-suite to newly hired employees. Video helps everyone to see, hear and feel the hearts and minds of customers.

### **Do you find yourself turning to qualitative or quantitative research the most, and why?**

I'm a frustrated number-cruncher at heart. Early in my career, qualitative was not true research to me. It wasn't science and it wasn't valid market research – other than to explore and develop hypotheses. I especially loathed focus groups as a way to hear what you wanted to hear. Now, later in my career, quantitative is a bias that I always guard against, especially when conducting surveys. I always try to ask myself: Can qualitative better address the issues? I've fallen in love with ethnographies and observation, especially using mobile and geofencing technology to track shopping behavior. I now see focus groups as valuable but am still not a big fan.



*“Before the Internet, there was an old saying in market research that you can only have two of three things – fast, accurate or cheap. With the Internet I now have all three!”*

Read the full interview at [quirks.com/articles/2016/20160622.aspx](http://quirks.com/articles/2016/20160622.aspx).



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