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July 2016
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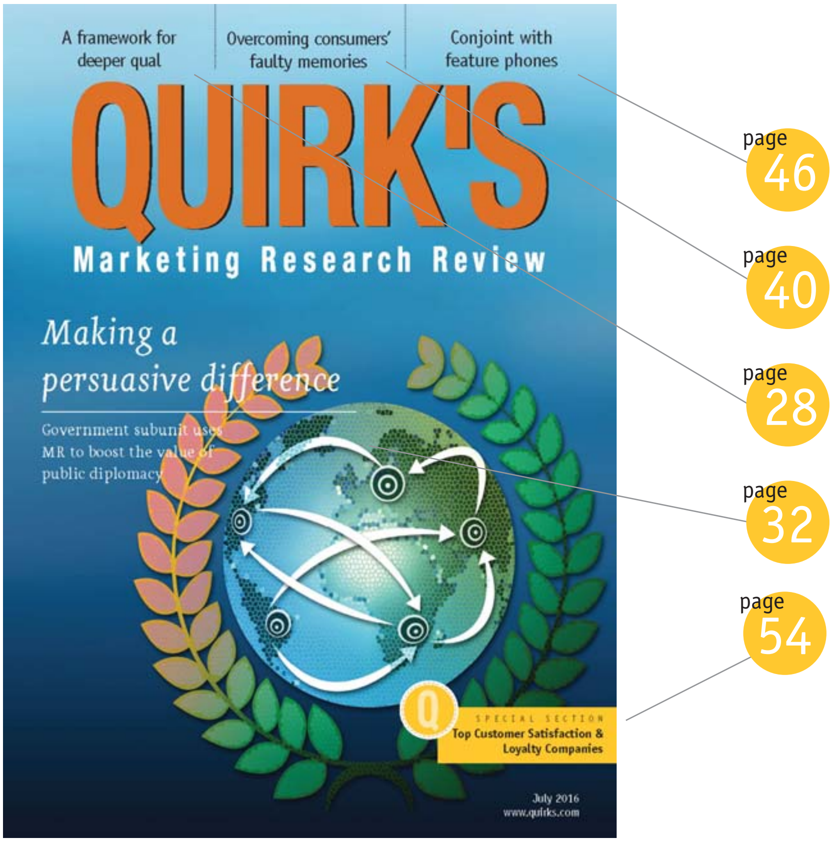

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Throughout the year, Quirk's partners with several research companies to produce MR-related Webinars. Each Webinar is also available as a recording in our online multimedia archive. Haven't been to our multimedia page in a while? We currently have more than 20 Webinars that cover a wide range of topics.

Visit quirks.com/multimedia/search-results.aspx to see all of the recorded Webinars that are available and sharpen your skills. Here are three recordings we recommend!

- **Strange Bedfellows: How to Leverage Both Traditional and Online Qualitative Research** – Today, more and more researchers are finding opportunities to combine both traditional and online qual within a single project, thereby giving participants a chance for greater experience and interaction throughout the study. Isaac Rogers, CEO of 20|20 Technology, demonstrates how this use of both traditional and digital methods can deliver more meaningful insights.

- **How One Beauty Industry Expert Uses Agile Research to Arrive at Winning Concepts** – The beauty business is competitive, fast and innovative. Gia Calhoun, global innovation and insights manager and beauty expert, and Lisa O'Connor, director of client services, GutCheck, discuss common pain points in the beauty industry and best practices around what types of research to conduct in order to solve for those.

- **How to Build a Successful B2B Research Strategy** – What's the right way to conduct research with IT decision-makers, VPs of sales at Fortune 500 companies or heads of HR? What is the best approach to sourcing and surveying these unique groups? SSI's Vice President of Audiences Jared Schiers and Director of Sales Rob Rocco present a one-hour Webinar on mastering B2B research.

For more information about working with Quirk's to produce or market a Webinar, contact Evan Tweed at evan@quirks.com or Lance Streff at lance@quirks.com.

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••• CPG research

Ethical halo for premium private-label products

As reported by RetailWire's Tom Ryan, a study has found that lower-tier private-label brands don't benefit from ethical positioning in the form of a consumer's willingness to pay more. Indeed, such a strategy can backfire against economy brands.

The study, from Concordia University in Montreal and published in the *Journal of Retailing*, found that, for premium private-label brands as well as national brands, consumers expect to pay more for products with ethical attributes, including claims of being environmentally-friendly, sustainably-sourced or fair-trade.

An earlier Nielsen study found that 66 percent of global respondents said they were willing to pay more for products and services from companies that are committed to positive social and environmental impact. But the Concordia University study found store brands with a lower price point did not benefit from the presence of ethical attributes aimed at enhancing social welfare or environmental protection.

A higher price point signals a standard or premium-quality tier positioning that is further strengthened by benefits associated with the ethical attribute (for example, a healthier product). These sorts of positive evaluations don't extend to low-priced store brands because ethical attributes aren't seen as contributing to the economic benefit that comes from purchasing them, said Onur Bodur, Concordia marketing professor and the study's lead author. In fact, the reverse is true: When ethical attributes are eliminated from economy store brands, their perceived value increases.

quirks.com/articles/2016/20160701.aspx

••• promotions research

Prize is biggest draw for contest entrants

A survey by Spain-based social media promotions firm Easypromos on the role of prizes in converting visitors to participants in a promotion such as a sweepstakes, photo contest, quiz or trivia contest found that, not surprisingly, the prize was the biggest lure.

Of respondents surveyed across Europe and the U.S., nearly half (48 percent) said the prize was the most important element in participation; 45 percent said it is a major deciding factor.

Eighty-two percent of respondents said that liking the prize was more important than the brand of the prize, with 18 percent saying the brand would drive participation. A quarter said they would be more likely to engage in a promotion that awards prizes that can be shared with others, while 29 percent of respondents said their preferred prizes were tickets and experiences like trips or dinners.

Seventeen percent of consumers listed technology gadgets as the most compelling prize, with other prizes like health and beauty-related items enticing 11 percent of respondents to participate.

By Joseph Rydholm, Quirk's Editor

What's on shoppers' minds these days?

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Joe Rydholm can be reached at joe@quirks.com

In conjunction with this issue's focus on shopper insights, it seemed like an apropos time for a quick look at some of the findings from a study of American shoppers that was conducted as part of the Better Homes and Gardens Best New Product Awards.

The winning products for 2016 were determined by the more than 38,000 consumers who participated in a nationwide survey conducted by research firm BrandSpark International in partnership with *Better Homes and Gardens*. They picked 74 winning products in the categories of: beauty; food and beverage; health and personal care; household; and kids. The full list of winning products can be found at BHG.com/bestnewproductawards.

I always get a kick out of how, shall we say, specific some of the subcategories are. For example, for every expectedly mundane subcategory like best new yogurt or best new cat food you also occasionally get things like "best new Mexican meal starter" or "best new sparkling beverage system."

Sample winners include: best new dessert – Breyers Gelato Indulgences; best new yogurt – Chobani Greek Yogurt Oats; best new paper towel – Bounty with Dawn; and best new gluten-free product: Ronzoni Gluten Free Pasta.

In case you were wondering, the award for best new Mexican meal starter went to Old El Paso Mini Soft Tortilla Taco Boats; Bonne O Sparkling Beverage System took home the prize in its nearly eponymous subcategory.

Along with determining the winning products, the BrandSpark/BHG American Shopper Study also offers an annual peek into the minds of American shoppers. Some highlights from this year's survey are:

New product interest: Seventy-five percent of consumers like trying new products. Seventy percent of shoppers say they will pay a little more for a new product that appears to be better than what was previously available.

Brand loyalty and shopping habits: Product innovation is as important as ever to capture shopper attention, as 44 percent say they are less brand loyal than they were a few years previously. Deals continue to drive trial, with 50 percent reporting they use coupons from coupon circulars "most weeks" and 26 percent now using a coupon app on their smartphone, often in addition to print coupons.

Food and health: While seven in 10 Americans are making some changes in order to live healthier, 67 percent are skeptical of the health claims they see on products. Although health is important, 63 percent agree that indulgent foods that are not all that healthy are sometimes worth it anyway.

Cooking at home: Sixty-nine percent of American shoppers say they enjoy cooking. An even greater proportion, 77 percent, says they try to prepare food at home as often as they can, driven by enjoyment and financial motives. Shoppers love products that offer great taste and convenience at a good value.

Over-the-counter health: Price is not always the main purchase driver in OTC. Sixty-six percent agree that they will often spend a lot more for health products they know work. "Natural" resonates with health product shoppers, with 53 percent saying they opt for natural products so long as they don't compromise on efficacy.

Household care: Household care products are rarely an impulse buy. Just 21 percent say they often make impulse purchases in the segment. Yet household shoppers are looking for new things: sixty-one percent look for products that are more environmentally-friendly; 51 percent are interested in "natural" cleaners; and 72 percent appreciate multipurpose household care products that are perceived to add convenience and value.

quirks.com/articles/2016/20160702.aspx

IN FOCUS

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

Q // Survey Monitor

••• health care research

Americans open to alternative treatments

Believe insurance should cover them

For many, the term "health care" likely leads to visions of doctors and prescriptions. But for some it can mean so much more. Alternative treatments – also known as non-conventional or naturopathic therapies, which include things like chiropractic care, massage therapy and herbal remedies – are used in place of or in addition to conventional therapies. Overall, according to a Harris Poll, younger people are more willing to embrace these alternative therapies and to use them more widely. In fact, one in four Millennials (25 percent) are using alternative therapies more than conventional options, compared to just 5 percent of Matures.

However, regardless of age, Americans are keeping an open mind when it comes to less-conventional options. Two in three Americans view alternative therapies as safe (69 percent) and effective (63 percent) and half think they are reliable (50 percent). Even more strikingly, majorities think some alternative treatments, like chiropractic and massage therapy, should be covered by insurance – more than actually have used them. These findings appear to suggest an expanded consciousness on what health and healing mean to Americans – not just prescription medicine and doctors but also having greater access to techniques that have been used for centuries to make people better.

"Though alternative treatments often predate modern medicine, consumer interest in these treatments today is bolstered by two important consumer trends: finding affordable care in a high-deductible world and seeking natural approaches to pain and disease management," says Jennifer Colamonico, vice president of Nielsen Healthcare. "As these trends are likely to continue for some time, we anticipate more consumers will consider and try alternative treatments as well as other types of self-care to achieve health and wellness goals."

Overall, about seven in 10 Americans (71 percent) have used some kind of alternative therapy before. Over one-third state they have used herbal medicines (37 percent) or chiropractic care (34 percent). For Matures (those aged 70+), chiropractic care is the predominant type of alternative therapy used, with nearly half having ever used it (45 percent). Herbal medicines appeal much more to a younger audience, with 40 percent of those under 50 having used it.

Usage of alternative therapies is higher among those who don't have insurance: Nearly half of uninsured Americans (48 percent) use alternative therapies as often as or more than conventional treatments.

When it comes to how likely Americans are to use alternative options for various conditions, a majority of all adults (64 percent) are likely to use these options to treat physical

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pain and Millennials and Gen Xers are particularly likely to consider such alternatives for things like addiction (60 percent and 57 percent, respectively) and mental health (57 percent each) as well.

What should be covered by insurance? Majorities believe chiropractic (67 percent) and massage therapy (53 percent) should be covered. Nearly half say the same of acupuncture (48 percent), including about six in 10 Matures (61 percent). For the rest of the alternative therapies presented, less than one-third think each should be covered by insurance: herbs/herbal medicines (30 percent); electrotherapy (23 percent); hypnotherapy (19 percent); reflexology (16 percent); meditation (15 percent); aromatherapy (13 percent); cupping (11 percent) and reiki (9 percent).

In this political season, it is interesting to note that Independents are more likely to use alternative therapies as often as conventional therapies (23 percent vs. 13 percent Republican) and are specifically more likely than their Republican counterparts to use things like meditation (24 percent vs. 13 percent Republicans), massage therapy (34 percent vs. 26 percent Republicans) and herbal medicines (41 percent vs. 33 percent Republicans).

This Harris Poll was conducted online, in English, within the United States between December 9 and 14, 2015 among 2,252 adults. Figures for age, sex, race/ethnicity, education, region and household income were weighted where necessary to bring them into line with their actual proportions in the population. Propensity score weighting was also used to adjust for respondents' propensity to be online.

Respondents for this survey were selected from among those who have agreed to participate in Harris Poll surveys. The data have been weighted to reflect the composition of the adult population. Because the sample is based on those who agreed to participate in our panel, no estimates of theoretical sampling error can be calculated.

••• financial services

Consumers want face time for big financial events

Hey banker, let's talk

Today's "on-demand" consumers want personalized attention from their banks and strongly prefer in-person assistance when making major purchasing decisions such as first-home mortgages, according to research from TimeTrade, a Boston firm providing appointment-centric customer experience services.

TimeTrade's State of Retail Banking 2016: Consumer Survey found that younger demographics especially value the chance to visit an actual branch. These younger bank customers strongly desire in-person discussions about first-home and other purchases, the research shows, with Gen Z (20 and under) and Millennial consumers emerging as the groups that are most willing to visit a bank branch when seeking important banking advice.

To better understand bank customers' current mind-set, TimeTrade conducted a survey of 2,064 consumers, asking in-depth questions regarding their perceptions and behaviors around their customer experience in banking. Results reveal that nearly half of consumers are looking to visit the branch, especially when they have important banking questions.

Consumers also expressed apprehension about banking automation, overwhelmingly opting to get banking assistance from actual people rather than from online tellers. "Today's customers now apply the same 'on-demand' requirements to banking that they do to retail, travel and other industries," says Gary Ambrosino, CEO of TimeTrade. "At the same time, the data tell us that people still want a face-to-face experience when making big financial commitments – not strictly automated online services – and they expect these services with minimal wait-time."

Other findings of the report include:

Consumers still want to meet a bank specialist in person at the bank: When asked how they would like to interact with their financial institution, 57 percent admit they would like to interact with their bank in-person at the branch.

Consumers are visiting their branches: 43 percent of respondents report visiting their bank branch more than 10 times a year, with the average consumer reporting they visited their bank branch more than six times per year.

When visiting their bank, 78 percent said one of the reasons they came to the bank was because they required assistance from a specialist. Also, when visiting their bank, 64 percent of consumers are willing to wait less than 10 minutes to be helped. Forty-six percent of respondents indicated they would like their bank to offer the ability to pre-book appointments.

Convenient location and personalized service are the factors most important to respondents when they visit their branch.

Despite some industry buzz, consumers are, for the most part, uncaring about whether a bank branch has a café-style environment and report it has no influence on their decision of where they bank.

Consumers are not ready for fully automated branches: When banking consumers were asked how they felt about experimental bank branches that have no tellers and offer only automated transactions, more than half would still like the option of being able to talk to a teller.

The survey suggests that banking customers prefer a high-value, in-person interaction. This gives banks a prime opportunity for cross-selling products and services – especially compelling in light of consumers' admission that insurance and wealth management are services they use least with their bank.

"In banking, personalization equals trust and smart banks are positioning themselves to build trust – and get more business – by personalizing their customers' banking experiences," said Ambrosino. "The power is now with consumers and today's on-demand customers have expressed their views very clearly: they want banks to deliver personalized attention."

••• technology research

Consumers comfortable with biometric sensors

See medical, other benefits

As the number of consumer technology products with biometric sensors grows, a majority (62 percent) of U.S. adults who have used biometric technology are comfortable with it, according to research from the Consumer Technology Association (CTA). The report, Biometric Technologies: Understanding Consumer Sentiments, also finds that nearly two-thirds of all consumers support biometric technologies for altruistic purposes in medical research (58 percent) and assistive technology (67 percent).

"Biometric sensors are changing the world – whether it's helping people with Alzheimer's and people with low vision identify their loved ones through voice and facial recognition, or providing stronger, more individualized personal security," says Gary Shapiro, president and CEO, Consumer Technology Association. "We are seeing a shift in consumer perception of biometrics that demonstrates an understanding of the benefits – such as streamlined security and personalized services – this technology offers. And as consumers become more familiar with the benefits of biometrics tech, that favorable perception will only grow. The industry has an enormous opportunity here."

The survey captures consumers' perception levels with different biometrics uses and settings and also gauges their levels of trust in organizations likely to manage biometric information. Findings from the survey include:

Consumer awareness and adoption: Although fewer than half of U.S. adults have adopted or used any biometric technology, digital fingerprinting (29 percent) and voice recognition (13 percent) are the most widely used technologies. Consumers are most familiar with biometrics commonly portrayed in the media – such as DNA analysis – and biometrics they have seen in the market, such as fingerprint readers on smartphones.

Consumer comfort levels: More than half of U.S. adults are either very comfortable or comfortable with the use of biometrics in locations commonly believed to already have a high degree of security screening – airports and national borders – and places perceived to lack safety such as high crime areas and public schools. Also, almost half of consumers are comfortable using biometric technologies at home and/or the workplace.

Consumer trust levels: Organizations that consumers view as traditionally handling sensitive information or those that serve important life functions such as hospitals and banks earn the highest trust level (64 percent).

"Consumers increasingly demand targeted, relevant tech services and products," says Shapiro. "And as more consumer technologies include innovations to improve accessibility and convenience, our industry is committed to strong consumer data privacy protections and transparency. Innovation and strong consumer privacy can and do co-exist."

In 2015, CTA unveiled its Guiding Principles on the Privacy and Security of Personal Wellness Data, a set of voluntary privacy guidelines for private sector firms that handle personal wellness data – the data often generated by wearable technologies.

••• financial services

Investors prefer blended management style

An active-passive mix

Results from a recent wave of StreetWise, E*TRADE Financial Corporations's quarterly tracking study of experienced investors indicate that while passive management is more popular among retail investors than active management, for the majority of investors, the debate between the two is irrelevant, as they prefer a combination.

When asked to choose from three portfolio designs, 8 percent chose a higher-cost, purely active approach that aims to beat the market; 31 percent chose a low-cost, purely passive approach that aims to follow the market; and 61 percent chose a moderately-priced approach that uses passive management to track broader, more efficient segments of the market, while leveraging active management that aims to seek outperformance in narrower and less liquid segments of the market.

"As the world of investing vehicles continues to expand, retail investors are seeking the best of both worlds in weighing passive against active management," says Lena Haas, SVP of retirement, investing and savings at E*TRADE Financial. "And while the findings support what many say about the rise of passive over active strategies, they also uncover a deeper reality: It's not about simply choosing between the two philosophies but thinking tactically about how best to combine them."

Haas says the following factors can play a role in why investors would gravitate toward a portfolio with both active and passive management:

To stay ahead of the class: When considering active versus passive management, neither is necessarily the best fit for every asset class. Many investors feel passive strategies work better for more efficient and broad asset classes like domestic large-cap, while active managers may be able to add value for less liquid and narrow categories like international small-cap.

To factor in fees: Many investors feel it's wise to understand when it makes sense to pay for active management and when sticking to lower-cost passively-managed vehicles such as ETFs and index funds is more appropriate. As hybrid portfolios evolve, many investors are developing a better understanding of what may or may not be worth a potentially higher fee.

To capitalize on customization: Combining active with passive management in one portfolio creates a larger world of possible solutions than focusing on one versus the other. The hybrid approach may better enable investors to build portfolios that closely align with their individual goals, risk tolerances and time horizons.

This wave of the survey was conducted from April 1-8, 2016, among an online U.S. sample of 907 self-directed active investors who manage at least $10,000 in an online brokerage account. The survey has a margin of error of ±3.25 percent at the 95 percent confidence level. It was fielded and administered by Research Now. The panel is broken into thirds of active (trade more than once a week), swing (trade less than once a week but more than once a month) and passive (trade less than once a month). The panel is 65 percent male and 35 percent female with an even distribution across online brokerages, geographic regions and age bands.

••• nutrition research

Defining 'natural' and 'healthy' food

Absence – or presence – of ingredients

The Food and Drug Administration (FDA) has asked for public comment on such questions as whether it is appropriate to define the term "natural," if so, how the agency should define it and how the agency should determine appropriate use of the term on food labels. (The comment period ended May 10.) When asked what the term "natural" means when applied to food, 29 percent of respondents in a consumer survey by the International Food Information Council Foundation (IFIC) said no preservatives or additives, as reported by Jeff Gelski of *FoodBusinessNews*.

Other top answers to the open-ended question were "natural ingredients/straight from nature/whole foods" at 19 percent, "no artificial ingredients or flavors" at 17 percent, "no chemicals/hormones/pesticides/antibiotics" at 14 percent and "no processing" at 11 percent.

Greenwald & Associates conducted the IFIC survey of 1,003 Americans aged 18 to 80 from March 17-24.

In responding to the survey, 37 percent of Americans said they were trying to limit or avoid packaged foods. The top three reasons for doing so were: artificial ingredients or preservatives; extra sugar, fat and salt; and a belief that packaged foods are not healthy. Forty-seven percent said they look at the ingredient lists on foods or beverage packages when deciding what to purchase, which was up from 40 percent in 2015.

When asked how they defined a healthy food, 35 percent said "does not contain" (or has low levels of) certain components (fat, sugar, calories, sodium, etc.). Coming in second and third, respectively, were "good for you" (18 percent) and "contains certain foods/components" (17 percent).

In the IFIC survey, differences were found in aided questions versus unaided questions. In aided questions, participants were given a list of items to choose as answers. Unaided questions were open-ended and participants were not given a list.

When asked how they defined a healthy eating style in an aided question, 51 percent listed the right mix of different foods among their top three choices. Another 41 percent listed limited or no artificial ingredients or preservatives among their top three choices and 37 percent said natural foods. When people responded to unaided questions the percentages were 21 percent for the right mix of different foods, 2 percent for limited or no artificial ingredients or preservatives, and 3 percent for natural foods.

The trend held true for non-bioengineered/non-G.M.O. foods. When asked to define a healthy eating style in an aided question, 16 percent listed non-

G.M.O. among their top three choices but the percentage was less than 1 percent in the unaided question.

When asked their overall impression of using biotechnology to produce food, 26 percent said they had neither a favorable nor unfavorable view, 25 percent said they did not know enough about it to form an opinion, 16 percent said somewhat favorable, 14 percent said not very favorable, 13 percent said not at all favorable and 6 percent said very favorable.

Protein stood out in this year's survey as 64 percent of Americans reported they were trying to consume more of the nutrient, up from 54 percent last year. Protein replaced fiber (60 percent this year) and whole grains (59 percent this year) as the top item consumers were trying to consume more of. Women and people with higher incomes were more likely to say they were trying to consume more protein. In keeping with the natural trend, the IFIC survey for the first time included natural flavors (41 percent) and natural colors (31 percent) in this question.

Within the protein category, 12 percent said they considered animal protein more healthful this year than they did last year and 15 percent said they considered it less healthful. For protein from plant sources, 21 percent said they considered it more healthful this year than they did last year and 8 percent said they considered it less healthful.

The media were a top source that caused a less healthful view of enriched grains, saturated fat, added sugars and low-calorie sweeteners, according to the IFIC survey. Media headlines also led to people having a more healthful opinion of whole grains, protein from plant sources and natural sugars.

Americans could have more knowledge of vitamins. While 83 percent said they viewed vitamin C as healthy, only 21 percent said they viewed ascorbic acid (another name for vitamin C) as healthy.

The number of Americans who said their food and beverage purchasing decisions were impacted by sustainability increased to 41 percent in 2016 from 35 percent in 2015. Only 38 percent said they would be willing to pay more for food produced sustainably, however.

Seventy-three percent said they think it is important that food products be made in a sustainable way. Within that 73 percent, 44 percent considered conserving natural habitat as an important aspect of sustainability, which was followed by reducing the amount of pesticides used to produce food (43 percent) and ensuring an affordable food supply (37 percent).

IN FOCUS

Product and Service Update

••• customer experience

Maritz expands CultureNext engagement platform

Optimizing employee and customer connections

MaritzCX, a Salt Lake City customer experience software and services company, and Maritz Motivation Solutions, a St. Louis-based employee recognition firm, have formed a partnership that joins the MaritzCX platform with Maritz's CultureNext engagement platform to offer an integrated solution to optimize the employee and customer connection and its positive impact on the customer experience. The newly integrated solution allows for customer feedback gathered in the MaritzCX platform to be turned into performance data for employees supported by recognition and rewards that are managed within the CultureNext platform. By combining the two SaaS platforms, companies can enhance visibility, information and action at each customer touchpoint with employees in each department, creating a continuous improvement cycle that helps businesses retain employees and customers longer, while growing revenue faster.
www.maritzcx.com

quirks.com/articles/2016/20160704.aspx

••• online research

Online MR crowdfunding platform launches

Share research insights and costs

Chicago-based start-up Collaborata launched in beta in May. The online platform enables research clients to connect to shape projects and share research insights and costs. Clients post projects they want executed to the site and other clients help shape the projects through their comments. Research suppliers, who are rated on the site by clients, bid on projects using a specially designed wizard. Once a vendor is selected, a funding goal is established together with a timeline and co-funding begins. Research suppliers can team directly with a client to pitch a study to other clients or leverage Collaborata to market their own multi-client project. Co-founder Jimmy Zollo was most recently at Chicago tech start-up GrubHub and co-founded Collaborata with his father Peter Zollo, founder and former CEO of TRU, a youth research and insights firm acquired by WPP and Kantar in 2012.
www.collaborata.com

••• research software

Dapresy Pro Version 10 available

Offering a templates library

Sweden-based data visualization software firm Dapresy has launched Dapresy Pro Version 10 for market research firms and marketing departments, featuring several enhancements. Dapresy Pro provides enterprises with tools to visually communicate actionable KPIs to each stakeholder in unique views. These can be customized for different categories of decision makers to maximize actionable outcomes. Dapresy Pro Version 10 offers a templates library that saves time building and designing dashboards and allows users to create their own custom templates. In addition, the Instant Infographics capability provides access to thousands of icons and shapes that can be directly tied to data with animations and action alerts to provide a better understanding of how and what to act upon.
dapresy.com

••• the business of research

New Research Speakers Club debuts

A forum to develop speaking skills

A new forum to grow the speaker talent in the marketing research industry has launched in Toronto, London and Chennai, India. The New Research Speakers Club, founded by

Annie Pettit, will give researchers, statisticians, data scientists, data visualization experts and others from related professions a forum to develop their speaking skills. The club is aimed at helping those who have limited speaking experience and those who have never spoken at a major conference before. The London chapter is chaired by Betty Adamou, founder of Research Through Gaming, and the Chennai chapter is chaired by Pravin Shekar, president of KREA. Pettit serves as the chair of the Toronto chapter. Chapters meet regularly for about one hour every two to three months and offer attendees the opportunity to speak about a research topic of their choice. The club is online at http://newrst.wordpress.com.

••• telephone research

SSI offers cellular phone database

Geographic and demographic variables

Shelton, Conn., firm SSI has launched SSI Smart Cell Sample, a comprehensive cellular phone database with targetable geographic and demographic variables that provides efficiencies in targeting participants and conducting survey research by phone. Available in the United States, Smart Cell Sample is based on confirmed data from wireless service providers linking phone numbers with owners' addresses. Including more than 480 million telephone numbers, Smart Cell Sample is verifiable and updated regularly. Approximately 80 percent of working RDD cell numbers match to low-level geographic data, while up to 60 percent have a full suite of demographic data appended, including age, gender, name, ethnicity, income, occupation and education. www.surveysampling.com

••• shopper insights

New platform for ongoing retail optimization

Brands compete for at-shelf decisions

State College, Pa., in-store behavior analytics firm VideoMining Corp. has released its new Brand Strength Tracking and Decision Analytics Solution. The latest offering leverages the firm's ShopperFirst platform and reveals where buying decisions are being made and how the decision process differs for every brand, category or shopper segment. The solution derives insights from millions of shopping trips per month to provide measures of: how reliant a brand is on at-shelf decisions; how a brand competes in at-shelf decisions; and how a brand's decision mix differs across demographic segments. Brand Strength Tracking and At-Shelf Decision Analytics collects and analyzes big data on in-store behavior and shopper characteristics. It provides tracking of KPIs to improve strategic and tactical planning across a range of marketing and merchandising functions, enabling: ongoing monitoring brand stability and at-shelf win rate; benchmarking performance and evolution of best practices; tracking comparative brand performance relative to overall category performance; and analysis of performance by specific shopper segments (demographic and trip type). www.videomining.com

••• Briefly

■ Iselin, N.J., research firm Schlesinger Associates has launched The Wall by Schlesinger, a dynamic, multi-window, interactive wall for free-form or structured display of variety of study stimuli or as a central repository of information from which insights can be actioned. The Wall is available in Schlesinger's key markets of New York City, Chicago and Los Angeles. It is designed for projects where visual impact for participants is important, high engagement is a challenge or critical or where the project involves idea generation/co-creation. The Wall is available for demonstration at Schlesinger's current series of Research Technology Days. www.schlesingerassociates.com

■ Chicago-based firm Doyle Research Associates has released *More Profit, Longer Life: How Qualitative Research Optimizes the Product Lifecycle*, a nine-page e-book that can be downloaded for free from the firm's Web site. doyleresearch.com

■ Nielsen, New York, has launched its enhanced offering, Total Channel Solution, allowing Nielsen clients to unify all data sets they have access to from any data, proprietary or third-party, across multiple platforms to achieve a total channel view of their business performance. The solution enables coverage of all channels, including measurement of specialty stores, e-commerce, mass outlets and department stores. It will also provide a perspective of performance drivers, leveraging and integrating Nielsen content while augmenting data through models, comparisons and forecasts. This launch leverages an alliance with big data discovery and data sharing solutions provider 1010data, utilizing its integration platform to bridge Nielsen's data sets, data science expertise and 1010data's big data engine to enable manufacturers and retailers to bring together all of the data they need to track, and ultimately grow, their business. www.nielsen.com

■ MaritzCX, a Salt Lake City customer experience software and services company, has introduced two new capabilities in its customer experience product offerings, PredictionCX and SocialCX, to help businesses broaden their understanding and response to customers. PredictionCX provides capabilities to help businesses grow by analyzing known customer information and applying it to predict customer loyalty. MaritzCX is partnering with PurePredictive, a technology provider with technology that uses artificial intelligence to automate machine learn-

ing, to deliver part of the PredictiveCX solution. MaritzCX will then use its platform and services teams for the remaining analytics and reporting. PredictiveCX will be integrated into MaritzCX dashboards and case management to provide a customer recovery system through a closed-loop process. PredictiveCX is currently being offered through a limited, early-adopter program. SocialCX is an offering that helps customer experience professionals manage and increase reviews on social media at the local/branch level.
www.maritzcx.com

■ In New York, marketing technology firm Experian Marketing Services has introduced the Audience Engine, an audience management platform that links and matches data across the marketing ecosystem in a unified, automated platform for targeting, execution and measurement of addressable advertising campaigns. Audience Engine provides users with a single platform to create, understand and activate their addressable advertising campaigns leveraging a combination of first-, second- and third-party data sources. For TV advertisers, this includes linear, addressable and over-the-top audiences, such as connected TV. Users of the platform can reach 85 percent of the entire U.S. population with addressable advertising campaigns and advertisers can reach 100 percent of the household-level addressable TV operators in the United States.
www.experian.com/marketing-services

■ Stockholm-based research technology firm Cint has launched Cint Connect, a real-time insights tool that offers a self-serve ecosystem for audience and ad effectiveness measurement. The global cross-panel, cross-device insight exchange enables panel partners to generate higher revenue on their communities as well as gather additional profiling data in an automated and cost-effective way by offering their members the ability to participate in advertising research.
www.cint.com

■ London-based researcher Kantar has integrated into Google Consumer Surveys. Through the collaboration, Kantar will act as a validation partner and leverage its research capabilities to ensure the accuracy, responsiveness and representativeness of Google Consumer Surveys panels. Using a systemic research validation program, Kantar becomes an early access support to Google Consumer Surveys as they expand into new markets. In 2016 Kantar will be providing validation services for Google Consumer Surveys as they deploy new mobile app services in Asia and Europe. Kantar's digital data collection enterprise, Warren, N.J., firm Lightspeed GMI, launched a joint service with Google Consumer Surveys in 2014.
www.kantar.com

■ In Sydney, researcher Lightspeed GMI has expanded its Re-Track capabilities to the Asia-Pacific region. Initially launched across Europe, Re-Track is a process to test, optimize and redesign tracking services to communicate with mobile audiences. It offers a full-scale design review of existing trackers and planning services for new trackers that includes sampling, fieldwork plan, question format and design. The firm has also unveiled the QuickTurn Insights and Fast Track Service solutions in APAC. QuickTurn Insights provides access to insights from consumers and offers 15 questions, 500 respondents, one open-end question, an incidence rate greater than 65 percent and five media/digital files, with results delivered in 48 hours. Fast Track, the firm's accelerated survey service, enables online surveys to be created within hours of submitting the final survey questions. With access to pre-profiled respondents, clients receive their survey within 48 hours of submitting their final questionnaire.
www.lightspeedgmi.com

■ Irvine, Calif., firm MFour Mobile Research has developed a new pipeline to push surveys to consumers based on the smartphone apps they use. Rather than asking panel members which apps they use, MFour's app targeting is based on passive tracking that automatically identifies and verifies the apps they've downloaded. This tool can be combined with GeoValidation, MFour's GPS-enabled respondent locator. GeoValidation certifies when panelists have arrived at a given retail outlet or other location that's relevant to a survey. The survey can then be completed on the spot, before respondents have finished shopping or shortly after they've left, while the experience is fresh in mind.
mfour.com

■ In the latest development in their strategic alliance, Kantar Media, London, and comScore, Reston, Va., will launch a series of cross-platform solutions in Latin America. TGI Clickstream, which is already available in the U.K., France and Turkey, will launch in Brazil later this year, enhancing clients' consumer targeting and digital media planning capabilities. Subsequent launches in 2017 include Colombia, Argentina, Peru and Chile. The service will combine TGI survey data from Kantar Media and MMX digital measurement data from comScore.
www.kantarmedia.com/us

■ Morganville, N.J., research technology labs provider Interactive Video Productions (IVP), with support from HCD Research, has introduced a Neuro Omnibus for Video Testing, which allows companies to receive information relating to the subconscious response of consumers to Web or broadcast video. It is designed to be integrated into traditional research, providing snapshots of data to help marketers identify content that contributes to the desired attention, arousal and emotions throughout the video. Researchers obtain metrics including an indication of the impact of the first six seconds of their tested ad and animated graphs exhibiting where and when responses varied throughout the video. Consultation with staff from HCD Research explaining the results will help to provide additional understanding of the data. The range of target audiences will include: Millennials, Boomers, Gen X, new car buyers, mothers of young children and online shoppers.
www.interactivevideo.com

■ Fishkill, N.Y., incentive solutions provider Virtual Incentives has launched its application programming interface (API) for rewards and incentives. It offers greater efficien-

cies from initial implementation to instant, personalized reward delivery. The new API is part of the company's complete rewards platform, which provides a complete solution from company-side program development to private, secure, instant reward delivery. The latest release of the API helps companies implement their application, loyalty platform or procurement system directly with Virtual Incentives.
www.virtualincentives.com

■ Warren, N.J., digital data collection firm Lightspeed GMI has expanded its data services capabilities by making available a set of consumer data sets tied to an online survey panel. Leveraging data from KBM Group and their I-Behavior data sets as well as Acxiom, Experian and The Futures Company, Lightspeed GMI can deliver enhanced profiles of U.S. consumers to its clients to provide more holistic views of shoppers/purchasers. AmplifyR Appends, now available in the U.S., aims to offer an understanding of targeted consumer segments by overlaying demographic data and lifestyle attributes to panelist profiles.
www.lightspeedgmi.com

■ Ipsos InnoQuest, New York, has launched InnoConstruct, a tool for identifying the best combination of concept elements, including headline, insights, benefits, reasons to believe, brand, price and package. Clients receive direction for building an optimized concept and simulations for what-if scenarios related to using different concept elements. Clients who use InnoConstruct will receive all of the standard deliverables that Ipsos InnoQuest's concept testing provides, including concept performance, trial potential and the Archetype Innovation Profile, which tells clients whether they have a Breakthrough, Me-Too, Niche, Premium or other type of innovation. Sales forecasts are also available and do not require the optimal concept to be re-tested.
www.ipsos.com/innoquest

■ SERMO, a New York-based social network for doctors and health care professional polling company, has launched SERMO RealTime, a research tool for frequent, short surveys with health care professionals. It allows users to query nearly 2 million health care professionals and taps into a global proprietary health care professional panel, including doctors in 80 countries and more than 40 percent of all U.S. physicians. It is also able to target by specialty and geographical location, as well as by disease state. RealTime has 200 medical conditions to choose from and plans to add more in the future.
www.sermo.com

■ InCrowd, a Boston-based provider of market intelligence to life sciences and health care firms, has introduced the InCrowd MicroTracker, an automated approach to life science tracking studies where brand perceptions by health care prescribers and consumers are longitudinally assessed and monitored over time. With the new solution, life science market insights teams can gather data on KPIs with an unbiased and representative health care sample as they define it against targeted specialists drawn from InCrowd's global "crowd." They can also automatically: repeat the fielding of a tracker survey; exclude previous respondents for a given number of waves; aggregate responses; provide visual comparison of waves; and filter results based on respondent groups or crowds.
www.incrowdnow.com

■ Unomer, a mobile market research technology company based in Palo Alto, Calif., and Bangalore, India, introduced a mobile in-app market research platform at AAPOR's Annual Conference held on May 12-18 in Austin, Texas. Unomer enables brand managers, consumer insight leaders and market researchers to create interactive surveys that can be natively embedded in and distributed across a network of mobile apps widely used for shopping, ticketing, travel, utility and gaming on smartphones. The approach is designed to give brands access to a large base of mobile users, allow targeting based on user profile and behavioral data and deliver intelligence in real-time as users provide instantaneous responses.
www.unomer.com

Evolving conjoint techniques to quantify buyer behavior

| By Seth D. Fowler

snapshot

A look at volumetric conjoint and how it can help model changes in purchase interest.

Choice-based conjoint is a research technique, popularized in the 1990s, that allows researchers to understand the utility of different product features and benefits. The technique is very good at determining the relative utility of individual product attributes, preference for sets of attributes (product/service concepts) and the magnitude of differences in preference. The technique has been improved in various ways since its introduction but current standardized methods force a single response and lack the ability to appropriately include volume-based responses. Companies want to understand preference but, more importantly, how changes to a product or service might impact purchase volume and, ultimately, sales and revenue. This article examines the application of volumetric data in conjoint research.

Choice-based conjoint is one of the few techniques that allows us to break down the utility of individual product attributes and build a model that can simulate not only preference for a current design but also understand the relative impact on preference of multiple changes to that design. This, in itself, has provided valuable insights to companies trying to understand how they can improve their offerings. In many instances, the information gained from choice-based conjoint can be used in concert with other information, such as the cost of the different attributes tested, to develop models that optimize the offering for consumers while minimizing costs to the business. For example, two attributes might generate similar levels of preference but one might cost less to supply. In this case, the product can be optimized for the consumer and the business. Consumers are just as happy with either option but the company can reduce its cost to provide the product.

Need more information

Regardless of the benefits current choice-based conjoint techniques provide, companies want and need more information. One key disadvantage of choice-based conjoint, mentioned previously, is that it does not measure the volume of items a consumer might purchase; it only measures preference for the items tested. This requires the addition of questions outside of the conjoint exercise to help determine how much more or less of a product consumers would actually purchase based on potential changes. Researchers have to make assumptions about the degree of impact on purchase volume created by changes based on both conjoint- and non-conjoint-related data from the survey. This has been a stumbling block for choice-based conjoint research in the past.

But what if the technique could produce volumetric data to model changes in purchase behavior? This would allow for a whole new level of analysis. Instead of only being able to calculate preference, we would be able to

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calculate changes in purchase frequency or volume. This information would be of great value and allow for decision tools that are more robust and able to optimize products and services based on potential changes in revenue and profit.

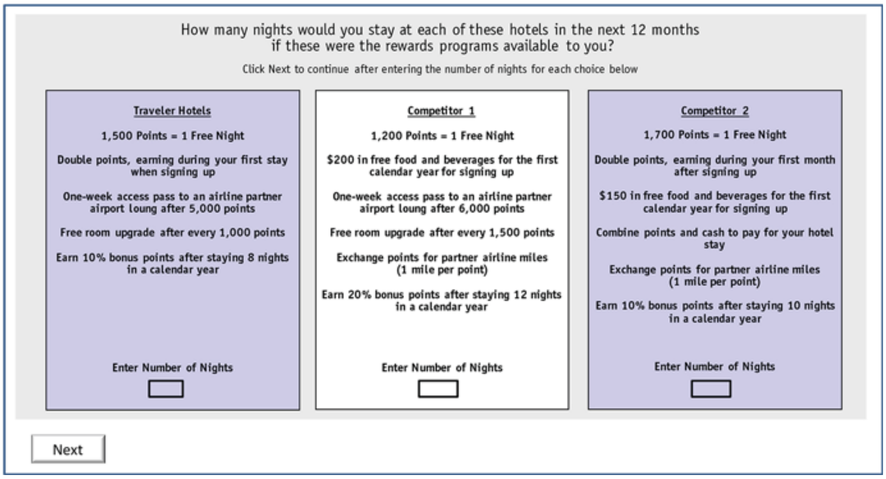
A logical next step

With the application of advanced statistical methods, this is becoming a reality. The inclusion of volumetric information in conjoint-based research is an area of current academic research (John R. Howell, Sanghak Lee, Greg M. Allenby 2015 and John R. Howell and Greg M. Allenby 2012). These techniques can be incorporated in choice-based studies to allow for the usage of many types of volumetric data such as the number of items that would be purchased or the number of store visits within a particular time frame. The application of these statistical techniques represents a logical next step in the evolution of conjoint analysis.

Current choice-based conjoint techniques frequently use what is referred to as a "dual-response none" method of collecting responses in the respondent task. Respondents are typically shown two to four combinations of attributes (product/service concepts) and first asked which one of the choices they prefer. On the same screen, they are also asked if they would actually purchase the product they indicate they prefer, or not. This allows for the estimation of individual attribute-level utilities and the calculation of shares of preference. However, this forced-choice setup is not always ideal, especially in cases where purchasing multiple items is the norm or even required.

With this new approach, respondents can input any number to reflect the amount they would choose as opposed to selecting only the most preferred option. This allows for understanding preference as in traditional choice-based techniques and also allows for determining the degree of preference since respondents can increase or decrease the volume according to their level of preference. The volumetric element is very flexible and can take many different forms, such as the number of purchases or store visits over a certain period of time or even the specific number of an item that consumers would purchase. The volumetric variable used is highly dependent on the type of information needed and how the researcher plans to size the opportunity.

Figure 1



Case study example

To illustrate this point, we will use an example of a rewards program for a fictional hotel chain, Traveler Hotels. Those who travel for business or pleasure have many choices for accommodations and hotel loyalty programs can have a positive impact on a traveler's share of bookings. Traveler Hotels is interested in maximizing its share of annual bookings among its current base of rewards program members and enticing non-members to enroll in the program. To meet this objective, Traveler Hotels wishes to develop a compelling rewards program that builds loyalty and commitment to the brand. Its current rewards program is basic and consists of earning points for every dollar spent at Traveler Hotel properties. These points can be accumulated and exchanged for free nights at any Traveler Hotel property.

Traveler Hotels has developed a list of potential rewards to add to the program but it first needs to understand how these different possible rewards will impact the number of times rewards members and prospective rewards members are willing to stay at its hotels. The list of benefits under consideration includes:

- earning and exchanging points for free-night stays (current rewards program);
- double-points earning for a length of time after signing up for the program;
- allowance of free food and beverages for the first calendar year after signing up;
- the ability to combine points and cash to pay for nights;
- free room upgrades after earning a certain number of points;
- exchanging points for airline miles at partner airlines;
- point-earning bonuses after reaching point earning milestones;
- access passes to airline partner airport lounges after reaching point earning milestones.

Each of these potential rewards (attributes) has an associated cost. Further, Traveler Hotels needs to understand which one(s) will increase share of annual nights booked and by how much. Traditionally, we would show the respondent three or four possible program concepts on the screen, ask them which they prefer and if they would stay at Traveler Hotels more often if the particular program was offered. With this revised method, the dual-response none is replaced with a volumetric measure. Instead, we ask how many times they are likely to stay at Traveler Hotels and two competitors in the next 12 months if the programs detailed were offered. Competitive brands are included in the exercise to allow for the element of competitive pressure. Figure 1 is an example of what the exercise might look like. As with traditional choice-based designs, the respondent completes several of these tasks indicating how many nights they would stay during the next 12 months at each hotel if the concepts displayed were the rewards programs available.

These volume estimates are then broken down. Just as in traditional methods where part-worth utilities are calculated, volume estimations are calculated for each attribute tested. Using a custom-designed model, we can then calculate how many nights respondents estimate they will stay annually for any given combination of the attributes (rewards programs). Using a volumetric measure adds a new dimension to the model. This information, along with the cost of the different rewards program options and per-visit spend can be modelled to determine the relative increase (or decrease) in revenue and profit for any given reward option tested. The current Traveler Hotels base rewards program is included in the model, allowing us to understand the impact changes to the program will make relative to the current program. The inclusion of competitive brands in the exercise creates a more realistic choice task for the respondent and helps alleviate some of the problems encountered with overestimating nights stayed if only one brand were present in the exercise.

A wide variety of situations

The example above uses a fictional hotel rewards program to demonstrate how this volumetric component can overcome some of the limitations of current choice-based conjoint methods. The technique adapts currently available commercial software to collect the data but the analysis is a custom statistical application. It can be applied in a wide variety of situations for different products, programs and services. It should be noted that these volume estimations are subject to the same limitation as traditional choice-based conjoint techniques, one such limitation being that an estimation of future purchase behavior may be impacted by any number of intervening variables. Product optimization should be the goal rather than the prediction of actual market performance in terms of revenue and profit. As with current choice-based conjoint techniques, it is important to minimize the complexity of the task respondents complete. Researchers should be aware of these issues as they formulate and report estimations in changes of volumetric purchase behavior.

This new technique represents an exciting development in conjoint analysis, broadening its ability to give researchers key market insights. This new tool allows for the use of volumetric information where previously only preference was established. As described, it does this by allowing respondents to indicate volume changes in their purchase behavior, based on changes to the product or service. Since this is a newer technique, little additional literature is available on the subject. For additional reading, please refer to the papers referenced below. This new technique represents a strong enhancement to current choice-based conjoint applications. As its adoption grows, companies will be keen to make use of its ability to predict consumer response to product changes.

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Getting deeper into the why through eliciting desired thinking

| By Marta Villanueva

snapshot

The author explores using the Thinking Skills Model as a qualitative research framework.

As market researchers, our goal is to uncover the insights beneath the opinions and stories. However, in our efforts to illuminate the what and why, we often pay less attention to the how. Understanding how consumers think can lead to even more powerful insights and discoveries.

The more we know about different types of thinking, the better we can encourage participants to engage in relatively uninhibited expressions of experiences and emotions to provide a better springboard for deeper sharing and theme identification. By leveraging creative thinking, we can uncover the latent emotions and motivations behind thoughts and behaviors.

Creative thinking leaders Puccio, Mance and Murdock in *Creative Leadership*[1] said it best: "Creativity … is a result of both thinking and emotion; it is a matter of both the head and heart."

The Thinking Skills Model

How do we elicit desired thinking from respondents in a qualitative setting? I believe that our most powerful tool for guiding these explorations is a concise framework based on over 50 years of research, the Thinking Skills Model. When we tie this proven framework to our tools, processes and methodologies, we are able to take our insights to the next level.

This framework is particularly suited to qualitative research. Learning the framework will put you in control of the thinking you want to elicit from respondents, making your discussion richer, deeper and focused. Within this framework, we can use our tools and skillfully craft strategies.

Qualitative becomes even more strategic when grounded in research and proven thinking, and through the application of the three model categories/phases (Figure 1): clarification of challenges and goals; transformation into new views and possibilities; and implementation of emergent concepts.

The framework is both structured and flexible to accommodate cycling through the different stages. It is structured, because it has stages and tools for each stage. It is flexible, because you can go in and out of the different stages as needed (it is not a linear process). In each of these categories, different tools provide keys to eliciting greater insight.

Diagnostic thinking

The center of this framework is an executive function: diagnostic thinking. As part of the qualitative process, or prior to basic project engagement, it is critical to identify the key components of the situation, along with how clients or their customers understand them. Diagnostic thinking provides an overview by organizing large volumes of data.

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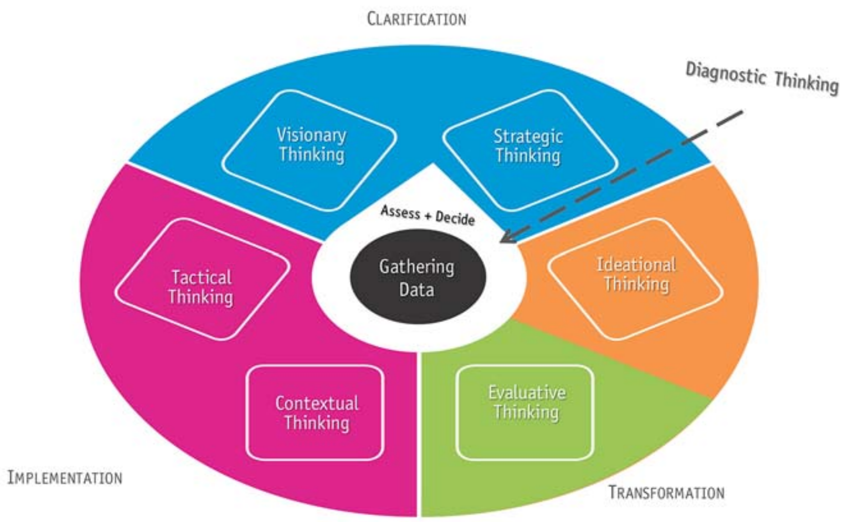
Figure 1



Nielsen & Thurber (2010) based on the work of Puccio, Murdock, Mance & Miller (2006)

Just like understanding the situation and background to determine research study objectives before recommending a methodology, diagnostic thinking places focus on reviewing data, facts or findings that define the current situation. It lets respondents and/or clients consider the cause-and-effect relationships between the problem and possible solutions.

Diagnostic thinking tools address questions such as: What is the nature of the problem? What might be the causes of this problem? What are the patterns or themes to the situation? What might be stopping forward movement?

Using tools within this mind-set empowers respondents to identify patterns, allowing us to see and organize the big picture, helping you decide on the next steps.

Thinking skill objective 1: clarification to deepen understanding

Clarifying the problem, either prior to beginning a project or as part of the process, is useful to understanding the ultimate goal. Clarification may even be the entire focus of the qualitative project.

Clarification uses two types of thinking. When a client requires clarification research, visionary thinking is needed to help respondents provide rich exploratory responses and stretch their imagination from the existing situation to their desired future state.

Once vivid images of the desired outcomes are articulated, we can then switch to strategic thinking, to help respondents articulate the unmet needs that must be addressed on the journey to a "better" experience.

The idea is to understand barriers and begin to see ways to overcome them. Eliciting strategic thinking can also help identify what is required to motivate change.

Thinking skill objective 2: transformation from ideas to solutions

In the transformation phase, we want to elicit ideational thinking to produce new and useful ideas, stretching the imagination and putting aside judgment to reach for many ideas. At this stage, the ideas may simply be rough in form or what I call "clues."

We then use evaluative tools and techniques to structure and shape the ideas. For this, we need to elicit evaluative thinking, which promotes moving from ideas to workable solutions. Refining ideas can convert them into feasible solutions. Eliciting evaluative thinking can empower respondents to provide clear direction on stimuli or ideas.

It is important to recognize when your clients benefit from exploring in a quantity-focused, anything goes, list-generating style (ideational thinking), versus focusing in a consensus-building style (evaluative thinking).

Thinking skill objective 3: implementation to activate solutions

Once customer needs have been clarified and concepts have been transformed, we move to the implementation phase. This phase uses contextual tools to understand reactions to potential action plan components.

Eliciting contextual thinking encourages respondents to explore bonds and barriers relevant to a product or concept in order to build understanding of the factors that could support or hinder success. Most importantly, eliciting contextual thinking can help provide clients with concrete feedback.

And finally, while in the implementation space, we need to elicit tactical thinking to plan the steps needed in the implementation of new strategies or concepts.

Eliciting tactical thinking empowers respondents to come up with specific steps to activate a specific idea, product or plan. Tools that achieve this goal successfully drill down to how respondents conceive of each element or aspect, either currently or conceptually.

Case study: packaged goods company

The following example shows how eliciting desired thinking can get us deeper into the why behind it all. A major packaged goods company wanted to find out how to increase consumption for its product. Putting on a diagnostic mind-set helped uncover that the optimal methodology would explore product usage deeply and in-the-moment. One of the objectives was identifying the visual identity that would most resonate on the packaging.

Target consumers were recruited to participate in a digital diary, leveraging their diagnostic thinking for one week, exploring both the in-store and in-home product experience. The digital diary also elicited strategic thinking in uncovering the product bonds and barriers.

They were then invited to a one-on-one discussion at a facility.

The two thinking skills in the clarification category (visionary and strategic) benefit from one of my favorite tools: storyboarding. In the initial visionary phase, the storyboarding exercise helps to identify what respondents would like to have in place of what already is. Eliciting visionary thinking empowers respondents to bring the product wishes to life in a vivid way. When we move to the strategic phase, storyboarding helps close the gap to identify steps between the current and desired states. Regardless of whether we are using our imagination to stretch or delving into the specifics of how to make this a reality, this exercise invites us to use many tools of creative expression – crayons, markers, scissors, glue, magazines, picture cards or journaling, to name a few.

Respondents in this study were given the challenge of creating a story around making the once-in-awhile product their go-to product. In creating this story, respondents were asked to depict the emotions and to describe all the challenges they faced along the way. The hero(es) in this journey must overcome the challenges, rise to the occasion and bring us to the happy ending. After creating the story, the participants were asked to give it a snappy title that captured the essence of the storyline. Using this rigorous structure to spark imagination and adding visuals, a number of engaging metaphors emerged.

Being purposeful in eliciting the desired thinking led to great insight into the existing situation. It resulted in ways to overcome the existing barriers to growth, giving the brand critical insight into winning communication messaging and visual identify. Without eliciting desired thinking, it would have been difficult to get focused, rich and below-the-surface responses, delving more deeply into uncovering the why behind the consumers' thoughts through leveraging the how.

Exercise the control

Placing client goals into the Thinking Skills Model enables you to design as well as select the optimal tools to manage thinking and exercise the control needed to achieve project success. Based on project need, you may focus on just one of the seven areas or step directly through clarification, implementation and transformation, exploring and formulating throughout each of these phases.

Using the concepts in the Thinking Skills Model enables deeper understanding and provides actionable solutions. When eliciting desired thinking, respondents are empowered to provide focused and rich responses. They are given the structure to tap into cognitive thinking and they are provided the flexibility to bring it to life in their own special way.

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government research

Making a persuasive difference

Government subunit uses MR to boost the value of public diplomacy

| By Myriam Benlamlih

snapshot

A State Department office aims to add some strategic value to the marketing research it conducts for public affairs officers around the world.

quirks.com/articles/2016/20160707.aspx

It is 9 p.m. in a small Asian country. Inside the U.S. embassy, the public affairs officer (PAO) is still at his desk. He is deciding where in the country he should bring a pair of American hip-hop artists when they visit for a two-day, embassy-sponsored goodwill tour. Will, ponders our PAO, touring them in the north of my country or touring in the south do more to build goodwill toward the United States?

Meanwhile, in an east European country, it is one hour before the largest national newspaper's print deadline. The PAO in that country is hurrying to finish a 500-word editorial that urges better U.S.-European relations. Which arguments, she wonders, should I keep in because my audience will find them more persuasive? And which less-persuasive arguments should I omit, to keep to my word limit?

Back in Washington, D.C., it is 9 a.m. In a set of nondescript cubicles, in a building across the street from the U.S. Department of State's main offices, R/PPR Research gets to work. This week it will draft questionnaires, scrutinize data files and release several new marketing research reports – all to help answer questions like those asked by the example PAOs above and by actual PAOs all over the world.

Traditional diplomacy is one country's diplomats negotiating with another's; public diplomacy is one country's diplomats engaging the people of another country, whether through cultural exchanges, embassy-sponsored events, press work, social media messaging or other means. In this way, public diplomacy resembles a communications campaign. Just as a politician employs political messaging to win votes or a large corporation uses advertising and consumer engagement to build its brand, so too do PAOs practice public diplomacy in order to generate goodwill toward the United States or, sometimes, to influence foreign opinion on specific topics of international relations.

Using marketing research

That is why, ever since the early 2000s, various government commissions, oversight agencies and think tanks have urged PAOs to adopt the best practices of effective political campaigns, marketing campaigns and other private-sector communications campaigns. One of those best practices is using marketing research. And by the 2010s, the State Department had indeed begun to supply PAOs with marketing research, including publicly-available survey data, such as data released by think tanks, original surveys and other specially commissioned polling along with purchased syndicated research on worldwide media trends and other select topics.

Unfortunately, this effort yielded few tangible changes to how PAOs practiced public diplomacy. That unfortunate truth was the main finding of an informal review carried out by the State Department's public diplomacy offices. The department was supplying its PAOs with marketing research but they were not using that research to improve how they did public diplomacy.

"We had research that answered the question, 'What is happening?' What we needed was research that answered the question, 'How do we win?'," says one anonymous PAO, remembering one of the reasons why he and his colleagues rarely used the research that State provided: Much of that research consisted of polling toplines or census figures or other raw statistics devoid of any real strategy. All too frequently, PAOs would receive only data, not data-derived guidance on how to achieve their public diplomacy goals.

Furthermore, the guidance the research did provide often could not be acted upon effectively with the modest resources that most PAOs have available. "It just wasn't practical," that same PAO recalls. "We didn't have the budget or the staff to put a lot of the polling into practice."

Also, State's "business process" for supplying market research was failing its PAO customers. "Research would sometimes get to us six, seven, months after it was commissioned," recalls another anonymous PAO. "Our embassy's planning cycle was already complete. And it was expensive, too."

Insufficiently strategic

In short, the State Department was providing PAOs with research but not research they could use. Much of it was insufficiently strategic; much of it was not actionable, given the resource limitations that PAOs face; and much of it was slow to roll out and expensive to execute. The research was accurate, done by skilled experts employing rigorous methods and it might have been useful for an academic study, perhaps, or for a thought leadership paper. But it was a poor fit for public diplomacy: a marketing research product that was not satisfying its users' needs.

The Office of Policy, Planning and Resources for Public Diplomacy and Public Affairs (or R/PPR – pronounced "ripper") is the State Department office in charge of policy matters for public diplomacy. R/PPR Research is a subunit of R/PPR. It was launched in the summer of 2015 by Tanya Ward, an experienced PAO, and Josh Miller, a marketing researcher with over 16 years of experience who was brought to State from the private sector.

R/PPR Research's mandate was to arm U.S. diplomats with a better class of marketing research and by early 2016, R/PPR Research had already released 60 marketing research reports. Each report is derived from an original survey of foreign public opinion; each report identifies good targets for public diplomacy engagement and promising messaging for public diplomacy communications; and each one does so by applying standard marketing research techniques to the survey data. Some reports advise on goodwill-building in general; others on how to shape foreign views on specific topics (for example, several reports on Asian countries advise on driving support for the TPP trade treaty).

Reactions have been enthusiastic. "This is exactly what market research should be. It's a breath of fresh air," says one officer at State who has worked in public diplomacy positions. "Now, our people actually use the research – and understand why research, in general, can be valuable to what we do."

The Public Diplomacy Council (PDC) agrees.

The PDC is a Washington, D.C.-based non-profit that advises government policymakers on public diplomacy matters. In January, it named R/PPR Research to its yearly "10 Best" list, describing R/PPR Research as a "long overdue public diplomacy innovation."

Valuable lessons

And that sentiment has been echoed by many PAOs themselves, who cheer the fact that State is providing research that its diplomats can actually use. It's a big turnaround and R/PPR Research's experience in bringing it about has valuable lessons for market researchers who, like R/PPR Research, are working to integrate private-sector research techniques into public-sector communications.

Lesson 1: Good market research is strategic – and a tool for strategic planning.

Before R/PPR Research, much of the research that State gave its PAOs was not strategic. It was raw facts and figures, not recommendations derived from those facts and figures. The research was descriptive, not prescriptive: it advised on what was happening, not on what to do about it.

R/PPR Research advises on both. Its reports describe public opinion as it is and they identify concrete actions that PAOs can take to shape public opinion. "PAOs don't want us just to ruminate," says R/PPR Research's Josh Miller. "They want us to give them recommendations, to give instructions. So that is what our reports do and that is what makes them strategic."

Those "instructions" tell PAOs whom to target, what messages to deliver and various other things they should do when doing field communications and also when doing the government's version of strategic planning: budgeting for impact by allocating resources in order to achieve a work goal as effectively as possible. Every year, the PAO in each embassy completes State's strategic planning modules – a series of proprietary, online tools that help PAOs budget their time, money and other resources over the coming 12 months. PAOs are discovering that the very same guidance R/PPR Research gives for field communications also helps with this planning process.

"Marketing research," says Miller, "can be a big help for strategic planning because research, at its most basic, is a tool of resource allocation. Its purpose is to maximize the impact of your finite communications dollars – to give you the biggest possible bang for your communications buck."

"For example," says R/PPR Research's Tanya Ward, "'target identification' is really just an eloquent phrase for telling a stakeholder, 'You'll do better to spend your time and money on these people, not on those people' – and when a PAO budgets to that advice, that is strategic planning."

"Being strategic – giving actual advice – is what makes marketing research valuable. And giving advice that is useful to both your day-to-day public engagement and your broader strategic planning makes market research doubly valuable for the government user," Miller says.

Lesson 2: Good marketing research fits government's capacity to use it.

Most PAOs have modest budgets and many work in countries with restrictive media laws. Those and certain other factors limit through what media and at what volume they can message to their audience. Print outreach is typically placed op-eds and walk card-style handouts, not direct mail or glossy magazine ads. Electronic outreach is social media and occasional television or radio news interviews, not slick paid spots run on prime time. And much of public diplomacy is not done through print or electronic channels at all but through face-to-face interactions between PAOs and very small audiences, such as presentations to local high schools or workshops with civil society leaders.

In this way, public diplomacy is more akin to a small retail campaign than to the campaigns run by major CPG brands or by well-funded presidential candidates and therefore, marketing research that recommends non-retail strategies is unhelpful to PAOs: it exceeds their capacity to use it.

Yet before R/PPR Research, much of the research that State provided was non-retail in its approach. Consequently, it could not be acted on with the resources that most PAOs had. For example, several research products analyzed the psychology and internal narratives of foreign audiences and urged PAOs to exploit those neuroses – an approach far too subtle for the official talking points, handouts with anodyne copy and other "blunt" outreach products that PAOs actually use. Another example: Several research products directed PAOs to buy lots of television and radio time – in some of the world's priciest media markets – a non-starter, as big media buys anywhere are unaffordable to PAOs.

"Market research is no good to public diplomacy if it can't be put into practice with the budgets or staff or outreach products that Washington provides our embassies," says Ward. "Those are just the realities that no PAO is going to be able to change, so the research needs to accommodate them."

That is why the only recommendations that R/PPR Research makes are ones that PAOs can actually implement. For example, the messaging R/PPR Research recommends is always simple, not sophisticated: arguments that are straightforward enough to be delivered by the inexact, unsubtle products that PAOs must use. And the targets R/PPR Research identifies are always ones that are ripe for the "ground game" PAOs play: subgroups that a PAO can meet in person or touch via cheap outreach or free media, not subgroups that are reachable only through broadcast communications or that are largely unreachable because of the illiberal communications laws of a given country.

"We recommend the possible," says Miller, "and eschew the impossible. Even government, with its huge resources, faces limitations on what it can and cannot do when doing outward-facing communications so government users need research that takes those limitations into account."

Lesson 3: Good market research needs a good business process.
"It isn't sexy but the business process matters," says Miller. "Marketing research that is delivered too late or that costs too much is no good to our PAOs, no matter how strategic or actionable it is."

Obvious enough. But before R/PPR Research, State's research business process was falling short. Delivery was slow: Turnaround time for an original market research project was often half a year or longer. And execution was expensive: The price tag was often six figures for a small project.

R/PPR Research recognized that State's business process was broken and it has instituted various fixes. For example, to expedite project turnaround, R/PPR Research developed in-house expertise in government contracting, so that now, the thicket of rules and procedures that dictate how State can contract with data collection houses no longer delays the execution of marketing research projects.

Another example: to cut costs, R/PPR Research streamlines its surveys, asking only those questions that are vital for analysis and omitting questions that would yield information that's interesting but merely "nice to know." Plus, whenever possible, R/PPR Research adds its survey questions to recurring omnibus surveys, rather than fielding them as stand-alone projects with higher start-up and interviewing costs. And R/PPR Research has also allowed other government agencies to purchase its raw data, generating revenue for R/PPR Research that has helped cover its research costs.

R/PPR Research has also hired our firm, the District Communications Group, to act as its back office. The DC Group is a PR and strategic communications practice with a focus on marketing research. We manage all data collection activities for R/PPR Research and oversee their work and ensure its methodological integrity.

Looking ahead

In its first year of existence, R/PPR Research has done a lot; over the next 12 months, it intends to do a lot more. A lot more in terms of quantity: R/PPR Research intends to release up to 100 market research reports. And a lot more in terms of variety: In the works are two new product lines, one that will employ qualitative data and a case study method and one that will employ big data analysis.

And also a lot more in terms of acculturating State to marketing research. "To many PAOs – in fact, to many government users – market research is still something very novel. So evangelizing market research, in general, and demonstrating its value to public sector communications is just as important as any particular report that R/PPR Research will ever release," Miller says.

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shopper insights

Single goal, many methods

Burke, Inc. helps a retailer understand shopper motivations

| By Michael Laux

snapshot

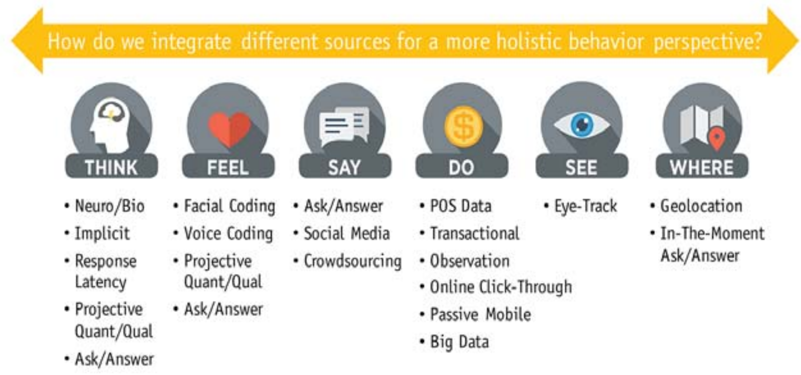
A multifaceted research approach uncovered the impact – or lack thereof – of a retailer's window displays on shopper behavior.

Why do people do what they do? That's the question that drives consumer research. And it's the question that drives our never-ending quest for insights – insights that can help us unravel the cryptic threads of human emotion, perception and behavior to reveal something groundbreaking – something that can transform the way a business approaches consumers.

For example, what exactly turns a window shopper into a "real" shopper? It's a simple question we wanted to answer for a global retailer of toys and games. Shoppers may say they like a window display and they may have positive feelings toward a window display but how do we know if and how these thoughts and feelings actually translate into purchase behavior?

The good news is that today's researchers are better equipped than ever to untangle this web of complexity. Thanks to new methodologies and expanding data sources, we can dig deeper to uncover the layers and

Figure 1



study the variables independently to reveal a more complete vision of consumer behavior. We can triangulate, or examine multiple angles to a question, to get to a more holistic picture.

Vast mound of data

Traditionally, researchers ask questions through well-crafted surveys, observe behavior and probe in qualitative settings, use advanced analytics to derive insight and at times link to external data about what people do. Today, we can complement those techniques with tools that measure non-conscious aspects of what people do, ask questions in the moment of experience and leverage their willingness to share parts of their multimedia kaleidoscope lives in the form of video, picture and online interactions. A myriad of information is available on what people do by virtue of connected devices, adding to an already vast mound of data.

Figure 1 is an attempt to catalog the tools available for marketing research today based on the key areas they illuminate. Each tool provides different perspectives about what people think, feel and do. While not a perfect or exhaustive classification, the point is we have a plethora of tools to help us untangle the messy process of decision-making. And that toolkit keeps expanding. It's important to clarify that several of these tools and information sources are new and some are still being studied to ensure they meet their intended goals. The study of human behavior is, after all, an ever-expanding exercise.

So the real question then becomes: Which tools do we leverage to view different angles of the story to find more complete insights? To answer that question, we need to clearly define and determine the specific research goals:

- Which behaviors do we seek to understand?
- Is observation critical to learning?
- Is it important to capture insights close to the moment of experience?
- Are unarticulated insights on behaviors, motivations and emotions vital to the research?
- Can we triangulate multiple inputs to build holistic insights?
- What is the best way to organize the plan for learning?

The responses to these questions help guide the selection of the best tools to achieve the research goals. More and more, the most comprehensive answer lies in the triangulation of several pieces of the puzzle. Leveraging additional tools to gain more insight into consumer behavior provides more holistic answers for the researcher, ultimately helping them make better, more strategic business decisions – which is exactly what happened with our retailer client.

Untangling the various aspects

So, how do we learn about what exactly turns a window shopper into a real shopper, one willing to pay for toys and games in our client's stores? The challenge centered on untangling the various aspects of how, why and if window displays influenced shoppers' purchase behavior.

Incurring a substantial cost each year on domestic and international window displays, the retailer sought to better understand which specific display elements were – and weren't – connecting with consumers. The window displays rotated popular themes and each execution of the display differed in style, elements and creative enhancement. The displays changed frequently, requiring concept and design teams, builders, manpower before and after hours and the coordination of multiple different departments. If the retailer knew which display and which elements of the display were the most successful in drawing shoppers into its stores, the company could implement a consistent global strategy for its retail outlets and, in turn, save a substantial amount of time and money. The end goal for our client was to centralize, streamline and economize its global display strategy for all retail outlets.

We sought to understand the impact of three different window displays. Key questions included: How much influence and stopping power does a retail window display have on potential shoppers? What elements are the most successful in generating more foot traffic? Does viewing another shopper engaging with the product create stopping power? Ultimately, does an eye-catching window translate into higher store sales?

After discussing our client's needs to define the research learning plan and objectives, we determined there were strong behavioral components behind what people think, feel and do that were important to study and triangulate to find a more complete answer to their question. It was also critical to measure reactions in the moment of experience and to observe behaviors in front of these windows. Many times researchers attempt to answer these questions using the most familiar tools available – the survey, some form(s) of qualitative and … well, we may have stopped there. Today, we know that asking questions and observing people provides quality information but that information doesn't necessarily tell us the full story. Shoppers who say they like a window display may not necessarily go into the store and buy toys. Shoppers who buy may or may not say the windows had an influence but they may have stood in front of it the longest.

Quite a tangle, indeed.

That is why we created a learning plan that offered a 360-degree view of consumer behavior to create a more holistic perspective. The learning plan included:

- A quantitative survey evaluation. The survey was a critical first step in understanding what shoppers say about the influence of window displays.
- Intercept interviews. Qualitative interviews with shoppers at the storefront let us probe and gain more insight into how people say they feel about window displays in the moment of the experience.
- In-the-moment "foot-tracking"data. This data allowed us to analyze what people do in front of window displays (whether or not they stop, how long they linger) and, more importantly, whether they actually go into the store.
- Point-of-sale purchase data. Provided by the retailer, this was the key behavioral outcome variable and was studied in parallel to the other inputs.

Each piece was examined, in detail, to identify and synthesize key, unique learnings in three areas: what people think, what they feel and what they do. Much of our learning took place at the moment of experience in front of the windows, which provided us with the opportunity to observe real time and capture nuances that may have been lost with time and not recollected as accurately. This "think, feel, do" triangulation quickly revealed that what shoppers think about a window does not necessarily translate to behavior. For example, in our quantitative survey, Window A could have significantly higher ratings than Window B on "coolness," uniqueness and preference. Further, in qualitative, Window A may even receive plaudits for its "wit" or "creativity" – but the behavioral angle told another story.

While Window A was praised for many reasons – and its novelty was not unmissed by shoppers – shopper behavior did not change based on the "cool" elements of Window A. That's right: There was no greater foot traffic in the store when Window A was displayed and sales remained the same regardless of which window was tested.

While the story was clear, the answer was surprising. We knew window displays were important to the extent that they entertain shoppers and positively support the brand. They also give passersby gift ideas and shopping inspiration during the holidays. But do windows correlate with changing behavior? Do they directly impact the bottom line?

Not for this retailer, according to our research.

We concluded that the retailer did not need to spend extensive amounts of money or time on window displays and the company definitely did not need to continuously update these displays. Our research taught the firm how to optimize and simplify its strategy (both in terms of dollars and execution) while not negatively impacting its shopper base.

Create a truer picture

In behavioral sciences, it is common knowledge that consumers are not entirely rational beings – they don't always do what they say or say what they think. Therefore it is up to us, as researchers, to insist on a comprehensive, multifaceted approach to learning and the application of different tools to learn about different angles of behavior to create a truer picture of consumer motivation. At the end of the day, it was this philosophy of triangulation that helped us untangle this particular case so neatly. Without multiple inputs, this retailer would have made a decision on its window display strategy based solely on the angle of what consumers say. By adding in angles focused on how consumers feel and what consumers do, our picture of them was deeply enhanced, allowing the client to make a more informed decision on its global strategy.

Consumers are complex, fickle, impressionable and – all too often – unsure of their own motivations. And that's on a good day. But now, researchers have more tools and resources than ever before to assist in the search for answers, for meaning, for understanding. After all, that is what "research" is – a search. And, rest assured, with an open mind we will always look for new approaches and innovations that help us formulate more holistic answers and make our lives … a little less tangled.

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••• shopper insights

Our malleable memories

What the sins of memory mean for marketing researchers

| By James Forr and Dominique Dove

snapshot

The authors offer tactics to help researchers to get around the shortcomings of consumers' abilities to recall their thoughts, experiences and reactions.

Some years ago, world-famous cellist Yo-Yo Ma, exhausted after a bravura performance at Carnegie Hall, carefully laid his $2.5 million Stradivarius cello in the trunk of a taxi, clambered into the back seat and rode off to his hotel. About 20 minutes later he arrived, paid the fare and trudged into the lobby, where he was struck by a thunderbolt.

He had left his $2.5 million cello in the trunk of that New York City cab.

The cellist talked to hotel security, hotel security talked the police, the police talked to the cab company and within three hours, the cello was back, safe and sound, and everyone lived happily ever after. Nonetheless, you hear a story like that and ask yourself, How could anyone be such a space cadet?

Unfortunately, though, memory makes fools of us all. None of us is immune. Given that we, as market researchers, rely heavily on people's memories of experiences with products and services, this poses a significant problem.

We like to believe that our memory is like a snapshot – a true-to-life, pixel-by-pixel representation of how an event occurred. In reality, though, our memory is more like clay. It is malleable and is shaped and molded over the passing weeks, months and years. Sometimes little pieces break off and tumble onto the floor, never to be seen again. Each time we recall a memory, it is apt to change slightly. Our unconscious mind fills in gaps, conflates multiple experiences into one and makes tweaks based on others' suggestions and our own evolving sense of self. In short, memory is reconstructive, not reproductive.

Daniel Schacter, former chair of Harvard University's Department of Psychology, published a landmark book entitled, *The Seven Sins of Memory: How the Mind Forgets and Remembers*. Four of his "sins" are particularly relevant for market researchers. We need to understand these sins and to devise strategies for working around them.

Before describing the sins, we should explain a bit more about how our mind pro-

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cesses past experiences. Psychologists identify three types of memory. Procedural memory is our memory of how to conduct a particular task. For instance, if you have cooked a Thanksgiving turkey each of the last 10 years, you should not have to open up a cookbook this year and relearn the process. The old cliché that "You never forget how to ride a bike" is true. Procedural memory tends to be quite stable.

Next is semantic memory. This is our memory for general facts, such as "What is the origin of Thanksgiving?" Semantic memory is highly variable, depending on how often a piece of information gets repeated and how relevant it is to an individual.

The third category is episodic memory – our recollection of particular experiences in our lives. Trying to recall what you did on Thanksgiving in 2006, for example, draws on your episodic memory. In market research, we rely heavily on consumers' episodic memories. Unfortunately, this form of memory is extremely volatile and highly subject to distortion. The four key sins discussed below – and derived from Schacter's work – relate mostly to lapses of episodic memory.

The sin of transience: Details mix as the clock ticks

What did you do at work yesterday? You probably can remember that in some detail. Now what did you do at work last Tuesday? You likely are struggling to recall any details at all. You can rattle off, broadly, what you probably did that day (drove into the parking lot, drank coffee, checked e-mail, went to some meetings, took the elevator down to the lobby and headed home) but odds are that most if not all of the particulars are gone. As time passes, we have more and more similar experiences, which cause the specifics of previous routine experiences to fade away.

Of course, time doesn't always erase. If you are reading this on vacation and last Friday was your last day at the office before heading out, you probably can remember a fair number of details because no similar events are getting in the way. Alternatively, if you received word last Friday that you won a prestigious industry award, you might remember that moment quite clearly for years. (Then again, you might not. Even so-called "flashbulb memories" – recollections of where you were on 9/11 or when the space shuttle Challenger exploded – that seemingly sear themselves into our minds are less reliable than we think they are and can grow dim or distorted over time.)

The sin of suggestibility: A nudge can make you fudge

The word "suggestibility" doesn't necessarily mean someone is trying to mislead people. Nonetheless, we need to be careful about the words we use, because it is exceedingly easy to cause someone to misremember an experience, just based on how we frame our questions.

Elizabeth Loftus is a pivotal figure in memory research and much of her work centers on how subtle cues or "suggestions" can lead our memory astray. In one landmark study, she showed people simulated video of two cars colliding at an intersection. One group of participants was asked what happened when the cars "hit" each other. The other group was asked what happened when the cars "smashed into" each other. The people in the latter group were more likely to recall seeing broken glass (even when there was no broken glass) and provided significantly higher estimates of the cars' speed.

In a more recent Loftus study, she studied army soldiers who were participating in a training exercise designed to simulate what it would be like to be a prisoner of war. Soldiers endured 30 minutes of intense questioning and hostile treatment. Later they had to identify their interrogator. Loftus found that researchers could feed the soldiers pieces of information that caused them to finger someone who looked nothing at all like the person who actually conducted the interrogation. Soldiers could be led to insist that the interrogator was wearing a uniform when in fact he was not. They could be led to insist that the interrogator was carrying a gun when in fact he was not.

This sin has real-life ramifications. Over the past 20 years, hundreds of American prisoners have been freed thanks to DNA evidence. Many of these prisoners were incarcerated largely on the basis of false eyewitness testimony. If memories can fail in the courtroom, where the stakes are extraordinarily high for all involved, then they certainly can fail in the marketing research facility where consumers are trying to recall their experiences with products that may, in the overall scheme of things, play a relatively unimportant role in their lives.

The sin of bias: Today shapes yesterday

Northwestern University is renowned for many things. Football is not one of those things. On the Friday before each of three big games in 1995, Northwestern football fans were asked to predict the likelihood that their Wildcats would win the next day. (As it turned out, the team, which had been awful for decades, was in the midst of the best season in its history. They won all three games.)

Then on the Monday following each game, another group of Northwestern fans was asked to remember how they thought their team would fare. The people who were asked to remember what they thought would happen were much more likely to say that they believed Northwestern would win compared to the people who had to go out on a limb and actually predict what would happen.

This is the “I-knew-it-all-along” syndrome. We all unconsciously try to manage our cognitive dissonance – that discomfort we feel when we recognize that our various thoughts and feelings are in conflict. We think our favorite team is going to lose but then they surprise us and win. For some reason, we can’t quite handle this, so we unconsciously revise our recollection of our previous beliefs.

This kind of revision occurs constantly. We tend to mold our memories of the beginning of a personal relationship based on how we currently feel about that relationship. If someone is experiencing physical pain, she will tend to remember earlier painful experiences as being much worse compared to when she is recalling those memories at a moment when she is pain free.

The sin of misattribution: Our eyes’ lies

In a delightful study, a group of people who had visited either Disneyland or Disney World were shown a mock print ad that depicted Bugs Bunny standing outside the Magic Kingdom. When asked about it later, more than 30 percent of subjects who saw that ad claimed that they either specifically recalled meeting Bugs at a Disney resort or at least had a vague, general memory of doing so.

The problem here is obvious. Bugs Bunny is a Warner Bros. character. He wouldn’t dare show his face at a Disney property.

This helps to explain why similar advertising runs together and why consumers often struggle to remember accurately whether they saw an ad for a particular brand.

Of course, the more consistent and ostensibly reasonable the “lie,” the more likely someone is to commit the sin of misattribution. If researchers tried to finagle people into thinking they saw a Martian at Disney World, no one would have fallen for that. Also, the more credible the source, the more easily that person can wheedle someone into a misattribution – even if they aren’t trying to. A police officer or a doctor (or a nattily-attired market research professional) is more likely to accidentally invite misattribution than a teenager in a clown costume.

Golden haze of memory

Sometimes it doesn’t matter if someone misremembers the details of an experience. A vacation, for example, is a classic example of post-consumptive experience. On that trip to the beach in Miami last year, you might have been hot and sweaty and covered in mosquito bites and your screaming toddlers might have been driving you nuts. But through the gauzy, golden haze of your vacation memory, you might only recall the abundant sunshine and that one lovely evening spent sipping a margarita with your husband by the pool. So where do you go this year? Miami, it is.

Actually, it can be instructive for a brand to understand the ways in which people misremember an experience. In the U.K., Pizza Hut interviewed customers as they left the restaurant and then followed up a week later to ask again about the experience. Not only did many customers forget some of the high points of their visit but they also invented negative details (like long waits or dirty tables) that were not part of their original account. Pizza Hut used these insights to make memories of the positive aspects of the restaurant visit more “sticky” and the results in a handful of pilot restaurants have been overwhelmingly favorable.

However, there are times, of course, when it is important to understand what actually happened during a consumer experience. When this is the case, researchers can employ several tactics that circumvent the sins of memory.

Be selective with surveys.

Surveys are useful for getting answers to relatively straightforward questions that don't require much intense reflection. If the election were today, for whom would you vote? Which brands come to mind when you think about pasta sauce? How long is your morning commute?

Among the things that surveys do much less well is to paint an unbiased retroactive portrait of what a consumer was thinking, feeling or doing at a specific point in time. As we have seen, humans tend to reconstruct the past based on what they know about the present but researchers often underestimate how dramatic that reconstruction can be. Consumers will answer questions about what they were thinking about back then but those answers should never be taken as gospel truth.

Be wise with your words. As Elizabeth Loftus learned in her prisoner of war simulation, subtle cues, like the words we use when crafting our questions, can unconsciously alter how people remember an event. Even the order in which questions are posed can scramble people's recollections.

Researchers must take special care to avoid leading questions, which sometimes is easier said than done. If a respondent can answer a question with a yes or a no you probably are leading them. If you preface a question with, "In other words, it sounds like you are saying..." you definitely are leading them. A better approach is to probe respondents with open-ended questions and neutral language. Rather than asking, "What problems did you experience during your stay at the Bedbug Inn?" you would better advised to ask, "Can you tell me more about your experience at the Bedbug Inn?"

Another technique is to incorporate the respondents' own language in your follow-up probes. If a satisfied guest tells you, "My stay at the Bedbug Inn was like a night in heaven," it would be valuable to follow up with a question like, "What happened that made your stay like a night in heaven?" In other words, be mindful about going where consumers take you rather than taking them where you want to go.

Sidestep the sins. Although marketers frequently want to learn what was going through a consumer's mind as she made a purchase, often the least helpful question is, "What was going through your mind when you made that purchase?"

As time passes, memories of specific everyday purchase decisions congeal into an undifferentiated blob, so unless the decision was made just a few moments ago or unless it was a major purchase that involved considerable research and conscious deliberation, that memory is probably gone. Furthermore, most human thought is unconscious, which implies that even if consumers do remember making a purchase it is unlikely they can accurately self-report all of the factors that subconsciously influenced their decision.

A surefire strategy for overcoming the sins of memory is simply to stop relying on memory. The fantasy world ideal, of course, would be to mind-meld with the consumer and literally get into her head at the moment of the purchase decision. But despite what some neuromarketers might have us believe, that still is not possible and may never be, so we have to seek out the next-best approaches.

Shop-alongs, observational research and diaries help us detour the murky underworld of memory and get us a couple of steps closer to what a consumer is thinking or doing in the moment. Although all of these old-school methodologies have their shortcomings, they at least can generate some hypotheses about what is driving behavior and purchase.

Experience-sampling uses text-messaging to capture consumers' thoughts and behaviors in real time – or close to it. For instance, if I want to track your daily water consumption, rather than asking you to estimate it from memory or even tally it at the end of the day, I could send you a text every 60 minutes asking how many glasses you drank in the last hour. Similarly, if I want to understand a patient's journey with depression, I could text that patient at specific intervals and ask, "How are you feeling right now?" Experience-sampling relies on self-reporting and the data often lacks context and richness but the methodology largely sidesteps the sins of memory and can produce a significant number of data points for analysis.

Implicit testing and deep-dive interviews cannot be conducted in the moment but they can reveal the unconscious meanings that lead a consumer to select one brand over another. If you are talking to a shopper who has purchased the same brand of detergent for 20 years, what went through her mind as she entered the laundry aisle is nearly irrelevant. This is an automatic, habitual purchase; she was more likely to have been thinking about her daughter's soccer game or last night's *Game of Thrones* than anything to do with detergent. In cases like this, it might be more valuable to understand what people don't know they know – the implicit meanings that consumers attach to a brand or the deep emotional relevance of a particular category in a consumer's life. In other words, you may find it more insightful to explore consumer psychology rather than purely consumer memory.

Must think carefully

In short, understanding what people experienced or what they were thinking during a past experience seems tantalizingly simple but we should not be led too easily into temptation. We must not assume that a memory is a photographic representation of what occurred because what people recall can differ, in ways both large and small, from what actually happened. As marketers, we must think carefully about how and when we ask questions about a past experience. We must try to get closer to being in the moment with consumers rather than relying solely on their reproductions of the past. And, sometimes we should reconsider whether consumer memory really is the key that will unlock the strategic insights we need.

James Forr is a director, and Dominique Dove a senior research associate, at Pittsburgh-based research firm Olson Zaltman. They can be reached at jforr@olsonzaltman.com and at ddove@olsonzaltman.com, respectively.

●●● mobile research

Working with what they have

Feature phones no barrier to conducting an effective conjoint study

| By Robin de Rooij and Robert Dossin

snapshot

Despite some technical limitations, a mobile study on Indonesian consumers' painkiller preferences produced very useful results.

More than 70 million people with lower incomes are crossing the threshold into the middle class each year; virtually all of them reside in emerging economies. By the end of the decade, roughly 40 percent of the world's population will have achieved middle-class status by global standards, up from less than 20 percent today. The rapidly growing ranks of middle-class consumers span a dozen emerging nations, not just the fast-growing BRIC countries, and include almost 2 billion people who spend a total of $6.9 trillion annually. Research suggests that this figure will rise to $20 trillion during the next decade – about twice the current consumption in the United States.

Those in the lower socioeconomic classes (SECs) of developing countries in Asia, Africa and South America may not have a lot of purchasing power now but they represent a rapidly-growing market. For many multinational companies, these lower-income consumers present a key business opportunity. To ensure that companies can sell their products and services to this demanding group, it is important to use research to understand their preferences.

With limited Internet penetration in many markets, targeting lower SECs is typically a difficult task. Running research online can be close to impossible because of the difficulty in securing a representative sample, as the PC and laptop are much less prevalent than mobile phones. Hence, researchers often turn to face-to-face interviewing instead. This method of recruitment can be costly, time-consuming, labor intensive and often unrepresentative of the total market due to the logistical constraints of in-person interviewing.

Although desktop Internet reach is limited to reaching around 600 million people, current mobile Internet access is at 2 billion and growing. And the number of smartphone users is expected to reach 4 billion by 2020; that's 80 percent of the adult population on Earth! As the gap between mobile and PC continues to widen, mobile is

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quickly replacing the laptop as the main channel to the Internet.

Now, with increasing mobile Internet penetration in emerging countries, there is finally an opportunity to access this target group through their smart phones – and even their low-tech feature phones.

Table 1

Painkiller Choice
What is the most appealing attribute for consumers?

Brand	Units Per Pack	Dosage (in mg)	Price (local R)	Format
Top 3 (combination large manufacturer & local):	3 options:	3 dosages:	3 different prices:	2 different formats:
Tylenol	24 tabs/caps	200 mg	7.19	tablets
Novalgin	20 tabs/caps	300 mg	10.99	capsules
Anador	16 tabs/caps	500 mg	12.49	

Through the same development

In the past decades, technology has greatly impacted how we interact with the world around us. Where sending someone a message used to take a letter, an envelope, a stamp and a few days for delivery, we can now interact instantly by chat or video-call with anyone we know. Research has gone through the same development, with pen-and-paper research becoming quickly outdated. More and more research is designed to take advantage of modern-day computing power and the interface of choice: the smartphone screen.

The steady development toward research conducted on smartphones (devices with a capable processor and 3G or 4G accessibility) today enables the easy rendering of highly sophisticated mobile Web surveys. It is possible to replicate sites like Amazon and have respondents go through virtual shopping trips that perfectly mimic their real-life purchases. But the mobile reality in many developing markets is very different from what researchers in the developed world are accustomed to. Most people in these groups still use slow feature phones with small screens that are connected through much slower 2G networks, severely limiting what's possible with a typical device in five to 10 minutes. This group is not used to shopping on Amazon on their phone, therefore a cool mobile survey that can replicate that experience doesn't add value. Instead, it's necessary to adapt to their reality and interact with the devices they have access to.

Forwarding-thinking researchers are exploring the limits of what is possible with mobile technologies in each market, using both basic and advanced methodologies. For developing countries, this means understanding how we can reach consumers using a low-tech phone, deploying advanced methods and applying trade-off techniques to forecast demand for specific products.

Case study: Painkiller usage and preferences in emerging markets

In the very competitive painkiller market, SKIM conducted a multi-country study using low-tech phones to assess market demand based on individual brand choice, package size, dosage, type (tablet or capsule) and price. The study output predicted significantly better than any previous forecasts and was very consistent across markets, including Brazil, Indonesia and South Africa.

Sample: It is clear that recruiting through traditional online methods yields a sample skewed towards higher SECs. The same is true when we recruit consumers who are smartphone users, which are more likely to be in a higher SEC. On the other hand, recruiting consumers who use only basic feature phones creates samples skewed towards lower SECs. To get a truly representative sample, one must recruit across all types of mobile devices. Because smartphone consumer penetration is not high in many emerging countries yet, it is important to ensure enough low-tech users will be recruited.

The mobile study in Indonesia, for example, was successfully completed with just two days of fieldwork in August 2015 and yielded 380 completes. Of those who responded, one-third used feature phones to complete the survey. The group consisted mainly of younger age groups, with around half of the respondents under 25 years old.

Design: Due to technical limitations, it is often assumed that more advanced research methodologies cannot be deployed on feature phones. However, if one strips the survey of all unnecessary components to focus on the essentials, it is possible to deploy advanced conjoint techniques on feature phones by enabling consumers to do simple trade-offs using their small screens.

For the Indonesian component of the painkiller study, researchers set out to determine how consumers choose a painkiller and which are the most appealing attributes. There were two or three concepts shown on-screen at a time. Consumers were asked to complete seven different choice tasks, each task varying the attributes of the product (brand, units, dosage, price and format). In each task, respondents chose one concept that they preferred most. This study was engineered to be completed with only 13 taps on a mobile phone.

Survey length: Related to the point above, respondents typically have a shorter attention span when answering a survey on a mobile phone compared to a laptop or a desktop or when being interviewed face-to-face. When setting up research to be conducted on a mobile device, the survey needs to be limited to the questions that truly contribute to answering the business question and avoid respondent fatigue. When a longer list of questions is necessary, it is best to split the research into multiple parts and ask respondents to participate in the second (or third) part at their own convenience for an additional incentive. This approach typically leads to higher involvement in phased surveys. In recent studies using this approach, up to 80 percent of feature-phone respondents who had already participated in the first part of the survey continued to participate in the second part when offered an incentive.

The challenge of reengineering conjoint from tablet to phone is not trivial: Just try to fit this the conjoint task shown in the table onto the display of a smartphone. Respondents were told to expect the survey to take 10 minutes; it it took on average only eight minutes.

The Indonesian portion of the survey quite successfully showed that brand is the most important attribute among consumers in the region and that Indonesians use painkillers for headaches and toothaches. Researchers also learned that respondents prefer tablets over capsules and – very importantly – that they are very price-sensitive.

Using this survey design, researchers could predict future buying behavior with statistical rigor based on just five trade-off choices made by 380 consumers. When compared with their actual purchase choices, researchers were able to successfully predict with accuracy comparable to that of traditional online studies.

Half the time

Traditional face-to-face interviews are usually costly due to their labor-intensive nature and usually take a lot of time because interviewers have to travel to the respondent, or vice versa. With mobile research, respondents can easily access the survey from their phones and insights can be gained in half the time. The cost of hiring staff is also significantly reduced, thereby making this form of research relatively more affordable when compared to traditional methods.

With its small screen sizes and shorter interview length, research on mobile devices is now a solid alternative to in-depth research in many countries. However, when targeting lower-income SEC consumers, tailoring the survey for low-tech phones is a requirement.

Finally, as business requirements of multinationals require increased access to lower-income consumers, the demand for quick insights is growing. Mobile phones – both smart and low-tech – are great tools for breaking down logistical and socioeconomic barriers for better access to consumers in every corner of the world.

Based in Singapore, Robin de Rooij is director Asia Pacific at Netherlands-based research firm SKIM. He can be reached at r.derooij@skimgroup.com. Based in the U.K., Robert Dossin is the firm's client solutions director EU. He can be reached at r.dossin@skimgroup.com.

Right on target

Why address-based sampling is much more than just addresses

| By Ashley H. Hyon and Dennis Dalbey

snapshot

For government-funded surveys, address-based sampling offers a useful balance between coverage and cost.

The Computerized Delivery Sequence (CDS) File is the raw address file from the U.S. Postal Service containing nearly every deliverable postal address in the U.S. In its raw form it does not yield itself as a useful sampling frame. However, by merging it with other public and commercial data sources to append additional geographic and demographic data, it can be transformed into a robust and versatile tool for survey research. The sources incorporated include those from the government, such as the American Community Survey, Current Population Survey and decennial Census. In addition, a myriad of ancillary data items such as telephone, name and demographics (i.e., age, gender, income, ethnicity, education, presence of child, etc.) can also be appended to the addresses from a multitude of commercially available databases. Access to multiple data sources will result in the highest possible match rates and provide the ability to possibly increase the accuracy of the data items.

Additional frame enhancements include amelioration of some of the known coverage problems associated with the CDS, particularly in rural areas where more households rely on P.O. boxes and contain inconsistent address formats. Another enrichment is the capability to geocode every address with all levels of census geography including census blocks.

Linear interpolation

Addresses are geocoded using a method known as linear interpolation. Interpolation is a fancy way of saying estimation. The geocoded location of each address is estimated based on the range of numeric values between the starting and ending nodes for each street segment. Generally, every node is assigned two values – one odd and one even, such as 100-198 and 101-199. The values of each node correspond to the known starting and ending addresses found on both sides of the street.

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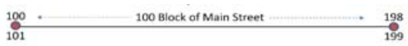
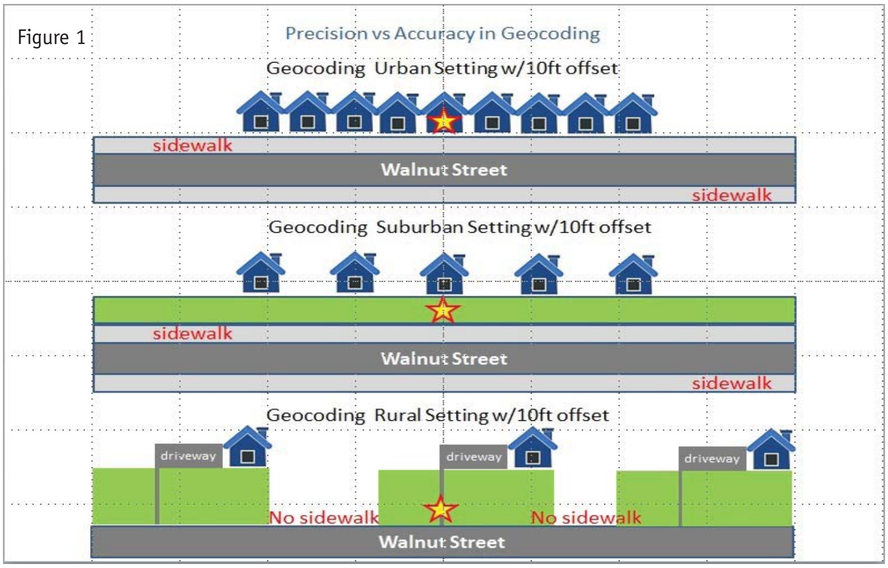


Geocoded addresses are then plotted based on the numeric value of each address itself and in the range between the starting and ending node. For example, if we were to interpolate address 150 Main Street it would be approximately midway between 100 and 199 so the address would be plotted in the middle of the street segment and offset to the side of the street where the nodes correspond to the even numbers.

Using this method of geocoding will always be accurate enough to append the correct underlying geography to each address but not always with the precision of rooftop geocoding results. Here's why: Interpolated geocoding will always provide accuracy to the street level. That is to say, if the correct address and ZIP code are provided, the geocoded results will always be accurate enough to determine the correct underlying geography of the address. How close or how far the geocoded location is to the actual real-world location of the address will vary depending on factors such as urban/rural settings, the distance between housing units, parks and open space, etc.

Housing units across the country vary in size, shape, distance from the street, urban, rural, suburban setting, etc. The main concentration in this process is to get the correct census block appended to the address record. Figure 1 illustrates an example of street-level geocoding in different density settings and how the precision of each geocode changes between urban, rural, suburban settings while the accuracy stays the same. For addresses that can't be geocoded at this level, census geography is assigned based on the Zip+4 centroid and then the unmatched from there based on Zip+2 and, finally, down to the standard five-digit ZIP code centroid. Over 90 percent of the ABS frame is geocoded at the street level.

This army of enhancements enables researchers to develop more efficient sample designs as well as broaden their analytical possibilities through an expanded set of covariates for hypothesis testing and statistical modeling tasks. To distinguish this amplified residential address frame from the original USPS CDS file, it has been branded as the address-based sampling (ABS) frame.



ABS provides the highest coverage possible for an address sampling frame, making it the gold standard for mail surveys. Figure 2 breaks out the ABS frame by each address type. The counts are distinct (each address is only counted once) even though an individual address can take on more than one characteristic (i.e., vacant city-style address). The only exception is that the drop points count is also included in the count of drop units. Simplified addresses are generally rural addresses without a physical street address and are not included in the ABS frame. Before the 911 conversion campaign to try and get every address locatable for emergency response services, the number of simplified addresses was roughly 10 million. With the success of the conversion campaign as well as with other augmentations, the number of simplified addresses is currently 467,357.

Researchers can also take advantage of the ABS frame in designing sampling plans for in-person household surveys, which typically involve a multi-stage sampling methodology of primary sampling units (PSUs) and secondary sampling units (SSUs) based on census blocks. The CDS file does not contain any census geography so prior to ABS only traditional field listing (physically going into the areas and listing every address in that segment) could be employed to develop the sampling frame of addresses. As you can imagine, this is a very costly and time-consuming process. Researchers can now rely on the ABS frame to obtain the list of addresses to sample from since every address is geocoded to a census block. Approaches of utilizing the ABS frame were sought by survey researchers as ways of dramatically reducing the time and costs in developing the sampling frame without compromising quality. It should be noted that only locatable addresses can be considered for this. This means P.O. boxes, rural routes, highway contracts and simplified addresses will be excluded.

Whether a field listing or an ABS methodology is used to develop the sampling frame for in-person household surveys, both will have inherent non-coverage issues that need to be addressed. Several different approaches to coverage enhancement have been developed. For more information on these procedures please view the AAPOR ABS Task Force Report available at http://bit.ly/25B7UUE.

Three-stage sampling methodology

The following focuses on the sampling methodology and the linkage procedures used to reduce the non-coverage bias by referencing a paper published by Westat, a long-standing research partner of Marketing Systems Group. Only the tip of the iceberg will be covered but the full published paper detailing all the research findings and citations can be viewed in the *Journal of Survey Statistics and Methodology*, Vol. 2, No. 3, September 2014 edition in "Handling frame problems when address-based sampling is used for in-person household surveys." The paper was authored by Graham Kalton, Jennifer Kali and Richard Sigman of Westat. Access it at http://bit.ly/20TvjtW.

For the study described in the aforementioned article, Westat implemented a three-stage sampling methodology. The study was a national household survey of over 65,000 sampled

Figure 2

ABS Frame (201603)	
Address Type	Count
City Style (street address)	120,570,990
Rural Routes/Highway Contracts	110,153
P.O. Box	14,185,527
P.O. Box (Only Way to Get Mail/OWGM)	1,439,913
Seasonal (vacation/second homes)	848,208
Educational (off-campus housing)	95,575
Vacant (long-term 90-day vacancy)	2,795,503
Throwback (mail being forwarded to P.O. box)	239,408
Drop Points (multi-dwellings with no unit information – one central mail drop-off)	740,559
Drop Units	2,134,144
Drop Unit Augments	61,533
City Style Augments	58,689
P.O. Box Augments	20,604
Simplified Addresses	467,357

households, sampled using a three-stage sample design. The third stage of sampling involved selection of a sample of addresses. Although the ABS frame was used as the primary source of addresses for this stage of sampling, as noted in the article, "The main address sample was supplemented by a sample of addresses that were either not on the USPS lists or not locatable from those lists."

Kalton, Kali and Sigman (2014) also echoed the same sentiment that the coverage of locatable addresses in rural areas has greatly improved due to the 911 conversion campaign. Aside from the under-coverage due to the unlocatable addresses being excluded it can also be related to the accuracy of the geocoding. For example, an address can be right on the border of two census blocks and it will be geocoded to one block but when physically viewed is actually in the other adjacent block. This can result in some addresses being geocoded outside the sampling area and, on the flip side, some addresses can be geocoded in that are actually outside the sampling area.

To identify and correct for any discrepancies in geocoding, Kalton, Kali and Sigman (2014) chose to conduct an address coverage enhancement (ACE) procedure for some of the sampled areas. They had field listers physically go out and record whether the addresses identified on the ABS frame as being located in these areas were indeed in or out. It was reported that about 90 percent were correctly geocoded but they did see differences based the type of area (urban vs. rural). In urban areas the accuracy was about 92 percent but for rural areas it was about 79 percent.

At the end of the study Westat deemed that ABS proved to be an acceptable frame for in-person household surveys, which coincides with the findings of other researchers who specialize in this field. For some small-scale surveys of urban areas, it is possible that the ABS frame alone could be used as the sampling frame. For larger studies or in rural areas you would need to incorporate some sort of coverage enhancement procedure. It was also noted that including the no-stat addresses that are not part of the main ABS file could be considered as an option to decrease some of the non-coverage. No-stat addresses do come from the U.S. Postal CDS file but are not part of the main CDS frame. These addresses can't be mailed to but they can be located for in-person household surveys. Currently there are about 8 million no-stat addresses, with about 10 percent of them being occupied.

Provides the best balance

Government-funded surveys are very concerned with coverage because they can't afford to have any bias in their outcomes for the reason that policy and program decisions are based on these findings. At the same time they also have budgets that need to be met. In the case of in-person household surveys ABS provides the best balance between coverage and cost. One last note would be that ABS is not limited to this type of research. On the contrary, it's a workhorse for probability-based panel recruitments, multimode surveys, non-response follow-ups and for designing stratified samples for the hard-to-reach populations, providing the highest efficiency rates without jeopardizing coverage.

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community of nine 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 – and we couple state of the art technology with broad respondent access to serve the customer feedback needs for many of the world's leading brands including CVS Caremark and more.

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Names of Note

■ **Ron Magliocco** has joined Boston-based retail intelligence and merchandising services company *Survey.com* as chief customer officer.

■ Research solutions firm *E-Tabs* has hired **Russ Budden** as consultant team manager for its head office in London.

■ Philadelphia-based B2B media company *NAPCO Media* has appointed **Nathan Safran** as director of research to lead the firm's newly-created research team.

■ San Francisco-based data connectivity services provider *LiveRamp* has hired **Jeff Smith** as CMO.

■ In the U.K., the *Institute of Practitioners in Advertising* has appointed **Clare McNally-Luke** as head of research and survey management and **Dan Flynn** as head of marketing and sales for its survey, TouchPoints.

■ San Mateo, Calif., software and solutions firm *Marketo Inc.* has appointed **Shankar Venkataraman** as chief scientist.

■ U.K.-based qualitative agency *Tonic Insights* has hired **Michael Aronsson** and **Lauren Moranor** as account executives for its New York office.

■ Denver research firm *iModerate* has appointed **Michael Steinberg** as senior vice president of client development and **Steve Dodge** as vice president of client development.

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Herrel

■ Cincinnati-based firm *Directions Research* has hired **Mike Herrel** as a development manager in the firm's Business Intelligence Group. Additionally, **Shannon Goyda** has been hired as a senior research analyst and will work remotely from the firm's Greensboro, N.C., office.


Goyda

■ U.K. research agency *Future Thinking* has appointed **Adele Gritten** as director of key accounts.

■ Dublin-based e-commerce analytics company *Profitero* has appointed **Daniel King** as president and COO, a new position within the company.


Dishaw

■ Baldwinsville, N.Y., firm *Research & Marketing Strategies Inc.* (RMS) has hired **John Dishaw** as QualiSight administrative associate for the firm's RMS QualiSight team.

■ Columbia, Md., marketing agency *Merkle* has appointed **Peter Randazzo** as chief technology officer, product.

■ *Probe Research Inc.*, New York, has hired **Latavia Curtis** to further the firm's client relations in major metropolitan markets across the U.S.

■ *Nielsen*, New York, has added **Lauren Zalaznick** as an independent director to the company's board of directors.


Wolff

■ **Allen Wolff** has joined Baldwinsville, N.Y., firm *Research & Marketing Strategies Inc.* as QualiSight lead telesurvey associate.

■ New York mobile brand advertising company *Kargo* has appointed **AJ Mathew** as vice president of research, a newly-created role.

■ **Panos Mastrogiannis**, chief information officer for retail merchandising and marketing services company *SPAR Group Inc.*, White Plains, N.Y., will be leaving the company to pursue other opportunities.

■ *Dunkin' Brands*, the Canton, Mass.-based parent company of Dunkin' Donuts and Baskin-Robbins, has reported that **Paul Twohig**, president of Dunkin' Donuts U.S. and Canada, has decided to retire at the end of the first quarter of 2017. The company plans to name a successor before the end of the year and is currently conducting a search which will consider both internal and external candidates. Twohig will remain in his current position until a successor is appointed. After that, he will remain actively involved with the company until he retires next year. Dunkin' Brands has also promoted **Chris Fuqua** to senior vice president, Dunkin' Donuts Brand Marketing, Global Consumer Insights and Product Innovation and **Scott Hudler** to chief digital officer.

■ Dublin-based firm *RED C Research & Marketing Ltd.* has appointed **Conor Murphy** as director.

■ *SmartBug Media*, an Irvine, Calif., inbound marketing agency, has hired

Katie Gutwein as a senior inbound marketing consultant.

■ Research and consulting agency *Research Partnership* has appointed **Tom Nolte** as director, head of business analytics, North America, based in the company's Philadelphia headquarters.


Nolte

■ *Communicus Inc.*, a Tucson, Ariz., research consultancy, has named **Tom Tessman** as vice president, senior director of client engagement to lead national business expansion efforts. Tessman will be based in the Minneapolis market.

■ **Paul O'Donnell** has joined Canada-based incentives solutions firm *360insights* as its new chief revenue officer.


O'Donnell

■ Southfield, Mich., shopper and consumer marketing firm *The Mars Agency* has appointed **Elise Wilfinger** as EVP, corporate strategy and brand officer. Wilfinger will be based in the firm's New York office.

■ **Julie Herendeen** has joined the board of directors for Cambridge, Mass., marketing and sales software company *HubSpot*.

■ **Jim Steber**, founder and president of St. Louis-based research company *Communications for Research Inc.* (CFR), will retire after 18 years and sell the business to his son **Colson Steber** and **Curtis Burrow**, both current executives at the company. Colson Steber and Burrow will assume the title of co-CEOs, while Jim Steber will join CFR's board of directors.

■ **Kenetta Bailey** has been named senior vice president, marketing for *CBS Radio*, New York.

■ Columbia, Md., performance marketing agency *Merkle* has appointed **Neil Gissler** as executive vice president, global technology and delivery.

■ U.K. retail and shopper data insights and consulting firm *Kantar Retail* has appointed **Cédric Guyot** as its new CEO for Kantar Retail Virtual Reality.


Frost

■ Los Angeles nonprofit *Women in Research* has added **Jane Frost**, CEO of the Marketing Research Society, and **Eric Salama**, CEO of Kantar Group, to its advisory board.


Salama

■ U.K. nonprofit organization *NatCen Social Research* has appointed **Nancy Kelley** as the director of its Policy Research Centre.

■ **Margie Omero** has joined research-based consultancy *Penn Schoen Berland*, Washington, D.C., as executive vice president and will lead its U.S. Public Affairs practice.

■ Fairfield, Conn., firm *GE* has promoted **Linda Boff** to vice president, CMO.

■ Cincinnati research company *Burke Inc.* has promoted **Thania Farrar** to vice president of research innovation.

■ Columbia, Md., performance marketing agency *Merkle* has appointed **Sean Creamer** as executive vice president and chief financial officer.

■ *The Urban Land Institute*, a Washington, D.C., nonprofit education and research institute, has appointed **Adam J. Smolyar** as its chief marketing and membership officer.

■ San Mateo, Calif., enterprise contract lifecycle management firm *Determine Inc.* has promoted **Rose Lee** to chief customer officer.

■ **Travis Santa** has been named vice president of Branford, Conn., firm *Touchstone Research Inc.*

■ **Nick Hawley** has joined Seattle-based marketing organization *Visit Seattle* as director of marketing.


Hawley

■ Culver City, Calif., panel and survey software firm *dataSpring* has appointed **Mark Sullivan** as director of business development - East Coast and **Irene Wang** as director of business development - China.

■ Research Triangle Park, N.C., e-commerce firm *ChannelAdvisor* has appointed **Melissa Sargeant** as CMO.

■ **Jay White**, CEO of Baltimore-based firm *Baltimore Research*, retired on May 29 at the age of 71.

■ *The Main Street America Group*, a Jacksonville, Fla., mutual insurance holding company, has promoted **Darryl Osman**, director, personal lines product management and market research, to assistant vice president.

■ Portsmouth, N.H., researcher *Opinions 4 Good* has appointed **Marco Otero** as senior director, client development.

■ *Facebook*, Menlo Park, Calif., has appointed **Shant Oknayan** as head of e-commerce, retail and online services at Facebook in the Middle East, North Africa and Pakistan.

■ Cloud-based incentive solutions firm *Xactly*, San Jose, Calif., has appointed **Micheline Nijmeh** as its CMO.

■ *Target Corporation*, Minneapolis, has hired **Mark Tritton** as executive vice president and chief merchandising officer. Additionally, **Jason Goldberger** will assume the newly created role of chief digital officer and president, Target.com.

■ Atlanta-based consulting, training and research firm *Butler Street* has appointed **Jefferson Allen** as CMO.

■ *Mobivity Holdings Corp.*, a Phoenix-based provider of mobile and non-traditional marketing technologies for the restaurant and retail industries, has appointed **Rick Muldowney** as head of analytics.

■ *The Lightspeed Group*, Warren, N.J., has appointed **Caroline Frankum** as CEO, Europe, Middle East and Africa and a member of the board of directors.

■ *MFour Mobile Research*, Irvine, Calif., has added **Daniel Baker** to its operations team as a project manager.

■ New York app-based communications provider *Multimedia Plus* has hired **Robert Guadalupe** as SVP, sales and marketing.

■ Venice, Fla., enzyme supplement company *Enzymedica* has appointed **Kevin Tautkus** as executive vice president of marketing.

■ Cambridge, Mass., research and advisory firm *Forrester* has hired **Mack Brothers** as chief consulting officer.

■ *Experian Marketing Services*, New York, has appointed **Jeffrey Wilks** as executive vice president and general manager, Experian Marketing Suite.

■ Port Washington, N.Y., researcher *The NPD Group Inc.* has hired **Kellen Frank** as vice president, product development for NPD's Retail Business Group sector. He will be based in Bentonville, Ark.

■ *Adobe*, San Jose, Calif., has named **Cynthia Stoddard** as senior vice president and chief information officer.

■ Customer engagement firm *Rosetta*, New York, has hired **Colleen McDuffe** as group vice president of marketing and communications.

Research Industry News

News notes

■ Los Angeles nonprofit **Women in Research** (WIRe) held its first WIRexec Retreat in Sausalito, Calif., on May 12 and 13. Presenters covered topics such as business strategy, leadership and empowerment and practical issues such as securing funding for growth.

Acquisitions/transactions

■ Jersey City, N.J., data analytics provider **Verisk Analytics Inc.** and New York private equity firm **Veritas Capital** have signed a definitive agreement under which an affiliate of Veritas Capital has agreed to acquire Verisk's health care services business, Verisk Health, for $820 million. The transaction is subject to regulatory approvals and other customary closing conditions. Upon closing, Verisk Health will be renamed and will operate as an independent company at its current headquarters in Waltham, Mass.

■ U.K.-based customer science company **dunnhumby** has taken an equity stake in **Aptaris**, a Tampa, Fla., marketing enterprise management software and services firm. The investment follows the announcement of a strategic partnership agreement in January between the two firms to integrate their complementary software solutions.

■ San Jose, Calif., firm **Adobe** has entered into a definitive agreement to acquire **Livefyre**, a San Francisco-based content curation and audience engagement company. Livefyre will be part of Adobe Experience Manager and integrated across Adobe Marketing Cloud to make user-generated content available across all eight digital marketing solutions.

■ Information and technology services company **IMS Health** and product development and integrated health care services firm **Quintiles** have been approved for a definitive merger agreement by their respective boards of directors where the companies will be combined in an all-stock merger of equals transaction. The merged company will be named Quintiles IMS Holdings Inc. The combined company expects to maintain dual headquarters in Danbury, Conn., and Research Triangle Park, N.C. Ari Bousbib, chairman and CEO of IMS Health, will become chairman and CEO of the merged company. Tom Pike, CEO of Quintiles, will become vice chairman. The company's board of directors will be comprised of six directors appointed by the Quintiles board of directors and six directors appointed by the IMS Health board of directors. The lead director will be Dennis Gillings. The transaction is subject to customary closing conditions, including regulatory approvals and approval by both IMS Health and Quintiles shareholders and is expected to close in the second half of 2016.

■ Dallas-based brand experience company **Freeman** has acquired **Exhibit Surveys**, a research and consulting firm. Exhibit Surveys and its employees will continue to work from their offices in Red Bank, N.J. The company will retain the Exhibit Surveys brand in the marketplace for the immediate future and operate under FreemanXP, Freeman's brand experience agency.

■ **EBay**, San Jose, Calif., has agreed to acquire Sweden-based machine learning and big data analytics firm **Expertmaker**, which has been a partner of eBay's since 2010, most recently helping with eBay's structured data initiative. Financial terms of the acquisition were not disclosed. Upon the close of the transaction, Expertmaker's employees will join eBay's structured data product and technology team. Lars Hard, Expertmaker's founder and CEO, will join as director, data science.

■ London-based media group **Dentsu Aegis Network** has acquired **Shanghai VeryStar Internet Science and Technology Co. Ltd.**, a mobile and online retail commerce agency in China. VeryStar will become part of Dentsu Aegis Network's digital agency Isobar China and will be known as VeryStar - Linked by Isobar. Milan Jiang, founder and CEO of VeryStar, will continue to lead the newly-formed company.

■ Washington, D.C., marketing analytics firm **TrackMaven** has acquired San Francisco-based attribution analytics platform **10Stories**. The company also announced a new joint product, TrackMaven Attribution, which allows customers to track the impact of their marketing throughout the entire sales funnel. With the acquisition, 10Stories co-founders T.R. Jordan and Benjamin Lu will join the TrackMaven team full-time. Jordan and Lu will open a new TrackMaven office in San Francisco and help to expand the company's product and engineering teams.

■ Chicago-based research and insights company **Shapiro+Raj** has acquired Addison, Texas, social-listening analytics, visualization and engagement solutions firm **MutualMind**. Terms of the deal were not disclosed. With the acquisition, Shapiro+Raj will combine MutualMind's digital technologies with its current research and strategy products and services to bring insights to its clients.

Alliances/strategic partnerships

■ Auburn Hills, Mich., research firm

quirks.com/articles/2016/20160713.aspx

Gongos Inc. and Minneapolis consulting firm **Panoramix Global** have formed a strategic partnership to help clients understand and analyze business trends and their impact on strategy and product development efforts.

■ As part of its strategic alliance with **Vermont Information Processing** (VIP), a Colchester, Vt., supplier of wholesaler depletion data to the alcohol beverage industry, New York-based **Nielsen**'s scan data reports will be available within VIP iDIG analytics and reporting tool. The integrated tool will provide iDIG users a view of VIP-collected depletion and operational metrics with Nielsen-collected and reported point-of-sale data for all brands and items in a category across multiple geographic markets and retailers. VIP acquired Nielsen's Beverage Data Network assets last year.

■ **Millward Brown Digital,** New York, and **Pinterest**, San Francisco, have formed a partnership that allows U.S. advertisers to measure the impact of their Pinterest campaigns on brand metrics including awareness, favorability and purchase intent. Brand Lift Insights, Millward Brown Digital's solution used to measure the impact of campaigns, provides insights into campaign impact on brand measures, allowing marketers to make strategic decisions on their current and future campaigns. Specific to the Pinterest platform, the solution answers questions such as: How do Promoted Pins on Pinterest shift consumers' perceptions of my brand? Are people more aware of my brand after exposure to Promoted Pins on Pinterest? Using Millward Brown Digital's practices for measuring advertising effectiveness, surveys are delivered directly in the Pinterest app, allowing consumers to receive the survey in the same environment as they saw the ad without interrupting their experience. Pinterest also offers in-house experimental design technology to identify causal relationships between ad exposure and change in attitudes. Pinners who would have normally been exposed to campaign advertisements are pre-selected before the campaign runs and, instead of a campaign ad, the control group is shown a PSA ad.

■ St. Louis-based data analytics and consumer insights provider **evolve24** is adopting **IBM Cloud** to host its neuroscience omnichannel data analytics platform for improved performance and scalability. Through its partnership with IBM, Armonk, N.Y., and the move to IBM Cloud, evolve24 plans to improve its competitive advantage, enhance client experiences, expedite new feature delivery and provide new channels to market.

■ **Pharmaceutical Marketing Research Group** (PMRG) Executive Director Stephanie Reynders has formed a partnership with the **Marketing Research Institute International** (MRII) designed to learn more about how the introduction of new research techniques impacts the careers of research practitioners. The new study will be based on earlier work first presented at last year's Corporate Researcher Conference. The study focused on client and supplier use of and attitudes toward 34 different research techniques. It also asked practitioners how introducing a specific innovation affected their careers. PMRG and MRII plan to expand the study into the health care industry to understand the specific challenges and opportunities of health care research practitioners as they seek to introduce new research techniques into their work. PMRG and MRII will use the research to improve and enhance their educational programs and offerings. Results will be released to the general public at the 2016 PMRG Fall Institute in Cherry Hill, N.J.

■ **Experian DataLabs** in North America and San Diego, Calif., mobile engagement and location intelligence solution **Gimbal Inc.** are working together on data and advanced analytics experiments. By leveraging Gimbal's suite of macro-location geofencing and micro-location beacons, the findings could help retailers offer instant credit to customers as soon as they walk into a store, as well as give creditors the ability to prequalify their customers on demand for car and home purchases based on the location of their mobile devices. Experian's DataLabs facility in San Diego, Calif., is outfitted with Gimbal beacons to help Experian's data scientists use experiments to analyze data and deliver greater competitive advantages.

■ Oslo, Norway, customer experience software firm **Confirmit** has extended its relationship with customer **Delvinia** for another three years. Toronto-based digital innovation company Delvinia leverages the Confirmit Horizons platform for its AskingCanadians and AskingAmericans online data collection businesses, as well as Methodify, a research automation platform.

Association/organization news

■ **AAPOR, ESOMAR** and **WAPOR** have collaborated to launch an international online training tool for journalists to help improve media reporting about polls and survey results. Aimed at journalists, media students, bloggers, voters and anyone interested in why polls work and how they are conducted, the course is hosted by the Poynter Institute, which provides online training for journalists. The course aims to help journalists understand and interpret opinion polls to ensure their reports are as objective as possible and identify what they need to know about a study so they can more critically assess poll quality. The content is based on a course originally developed for the U.S. by AAPOR. It has been updated to cover the latest methodologies including online polls and expanded with examples from all over the world for international coverage. The course is available free of charge.

Awards/rankings

■ **RealityMine**, a U.K.-based provider of mobile research technologies and consumer analytics, has been awarded the 2016 Queen's Award For Enterprise. The company was recognized for outstanding achievement in international trade by the awards, which are made annually by HM The Queen to U.K. businesses. In addition to international trade, awards are also given for innovation and sustainable development. The firm was awarded for the growth it has achieved since its inception in 2012.

■ **InCrowd**, a Boston-based provider of real-time market intelligence to health care and life sciences firms, has been included in the "Cool Vendors in Life Sciences, 2016" report published by Stamford, Conn., researcher Gartner Inc.

■ Netherlands-based data collection

software provider **Nebu** has been nominated for the Rabobank Pioneer Award at the Dutch Crowdfunding Awards 2016. Last year Nebu ran a successful crowdfunding campaign via Symbid, The Crowdfunding Network. The firm's objective is to accelerate its growth.

■ **Jonathan Price**, CEO of digital rewards company **Virtual Incentives**, Atlanta, has been named a winner in the CEO World Awards in the Most Innovative CEO category. Price won a gold level award for his work in using technology to drive new end-to-end solutions for the digital rewards and incentives space, including the development of the industry's e-gift card, Virtual Visa and Virtual MasterCard delivery technology.

■ In New York, **Justin Edge**, researcher **GfK**'s global head of health, has received PBIRG's President's Award for his contributions to pharma and health market research. Kai Bode, consumer lead for customer strategy and innovation at Merck and president of PBIRG, presented the award at the organization's annual general meeting. The President's Award is given each year to a pharmaceutical market research expert who has provided service and support to PBIRG and its goals of delivering research excellence and expertise in the field.

New accounts/projects

■ Warren, N.J., research firm **Lightspeed GMI** has signed a multi-year contract with Reston, Va., firm **comScore** to assist in building and maintaining its Total Home Panel. Concentrating on U.S. households, the panel will enable comScore to measure and better understand the totality of household Internet traffic across all device types including PCs, mobile, tablet, game consoles, connected television and the Internet of Things. To lead this initiative, Lightspeed GMI has hired Chris Fabber as vice president, behavioral panels, AMS.

■ **Univision Communications Inc.**, a New York-based multimedia company, has signed an agreement for New York-based **Nielsen**'s National and Local Digital in TV Ratings services. Univision and UniMás Networks as well as local affiliate stations will receive audience estimates of linear television content viewing on mobile and computer devices. The audience contributions from the digital devices will be included in the TV ratings.

■ Business event **C2 Montréal** has selected Montréal-based survey software firm **Voxco** as its official survey technology partner. Voxco's multi-mode survey platform will be used for the event's attendee feedback program. Volunteers with tablets administer surveys both inside and outside the event, allowing C2 to have a live read of shifting attendee satisfaction levels during the event and instantly take action on the results if necessary. The feedback program also includes post-event online surveys to measure additional aspects of attendee satisfaction and help evaluate the economic impact of the overall conference.

New companies/new divisions/ relocations/expansions

■ Wilton, Conn., **B2B research** and advisory firm **SiriusDecisions** has opened its first office in Latin America, located in Mexico City, and has appointed Paulo Kalapis as Mexico country manager.

■ Dublin-based research agency **RED C Research & Marketing Ltd.** has opened a new London office in Soho. RED C Research UK Ltd. is a new joint venture between the agency, together with Richard Barton and Charlotte Butterworth, who both left their MD roles in February to set up the new business.

■ Marcie Berenson, a market research health care industry veteran, has opened her own firm, **Connected Research & Consulting**, based in Boca Raton, Fla. Berenson and her team manage global health care and B2B specialty recruiting, including ethnos with B2B and recruitment and management of ad boards for pharma projects.

Research company earnings/ financial news

■ Paris-based researcher **Ipsos** has reported revenue of €386.9 million for the first quarter of 2016, up 1.9 percent compared to the same period last year. Total organic growth was reported at 3.7 percent for the first quarter of 2016.

■ **Forrester Research Inc.**, Cambridge, Mass., has reported total revenues of $77.4 million for the first quarter of 2016, compared with $75.2 million for the first quarter of 2015. Research revenues increased 3 percent and advisory services and events revenues increased 4 percent compared with the first quarter of 2015.

■ San Mateo, Calif., marketing software firm **Marketo Inc.** has reported that its revenue for first-quarter 2016 increased 35 percent year-over-year to $62.2 million. Deferred revenue increased 37 percent year-over-year to $91.7 million.

■ Stamford, Conn., researcher **Gartner Inc.** has reported total revenue of $557.3 million for first-quarter 2016, an increase of 18 percent over first-quarter 2015. Research revenue for first-quarter 2016 was $440.3 million, up 16 percent compared to first-quarter 2015 and consulting revenue was $84.9 million, an increase of 11 percent compared to first-quarter 2015.

■ Redwood City, Calif., audience technology company **YuMe Inc.** has reported revenue of $39.2 million for first-quarter 2016, compared to $40.1 million in the first quarter of 2015.

■ In the first three months of the year, Nuremberg, Germany, firm **GfK Group** sales totaled €360.5 million and organic growth amounted to 0.9 percent. Currency effects led to a slight overall decline in sales of 0.6 percent when compared with the first quarter of the previous year. Adjusted operating income increased to €32.1 million in the first three months of the year, equating to an improvement of 17.6 percent on the previous year's figure. The GfK Group's margin rose by 1.4 percentage points to 8.9 percent.

■ Wellesley Hills, Mass., data management and customer engagement software firm **RedPoint Global Inc.** has raised $12 million in Series C funding led by Grotech Ventures and WP Global Partners LLC. The funding will enable RedPoint to expand operations to meet demand in international markets, cultivate a growing partner ecosystem and accelerate development of new product offerings.

CALENDAR OF EVENTS

••• can't-miss activities

IIR will hold its OmniShopper event on **July 10-13** at the Radisson Blu in **Chicago**. Visit marketing.knect365.com/omnishopper.

Unicom will hold its Next Generation Testing conference on **July 14** in **London**. Visit conferences.unicom.co.uk/next-generation-testing.

Unicom will hold its AI, Machine Learning and Sentiment Analysis Applied to Finance on **July 14-15** in **London**. Visit conferences.unicom.co.uk/sentiment-analysis.

The Merlien Institute will hold its MRMW North America conference on **July 18-19** in **Fort Worth, Texas**. Visit 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.

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.

The 2016 Pharma CI USA Conference and Exhibition will be held on **September 13-14** at the Hilton Parsippany Hotel in **Parsippany, N.J.** Visit usa.pharmaciconference.com.

The Strategy Institute will hold its Third Annual Digital Customer Experience Strategies Summit on **September 13-14** in **Chicago**. Visit 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.

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

ESOMAR will hold its annual Congress on **September 18-21** in **New Orleans**. Visit 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.

The Strategy Institute will hold its 3rd Annual Digital Customer Experience Strategies Summit on **September 21-22** in **Chicago**. Visit 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.

Worldwide Business Research will hold its Mobile Shopping Summit 2016 on **October 17-19** at the Renaissance Indian Wells Resort and Spa in **Indian Wells, Calif.** Visit mobileshopping.wbresearch.com.

IIR will hold The Market Research Event 2016 on **October 17-20** at the Boca Raton Resort and Club in **Boca Raton, Fla.** Visit www.iirusa.com/research/event-home.xml

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

PMRG will hold the 2016 PMRG Institute on **October 24-26** at the Crowne Plaza in **Cherry Hill, N.J.** Visit www.pmrg.org.

The Strategy Institute will hold its 2nd Annual People Analytics Summit Canada event on **October 25-26** in **Toronto**. Visit www.peopleanalyticscanada.com.

Research & Results will hold its annual conference on **October 26-27** at the MOC Convention Center in **Munich**. Visit www.research-results.com/home/index.html.

The American Statistical Association will hold its International Conference on Questionnaire Design, Development, Evaluation and Testing (QDET2) event on **November 9-13** at the Hyatt Regency Miami in **Miami**. Visit www.amstat.org.

ESOMAR will hold its Global Qualitative 2016 event on **November 13-15** in **Berlin**. Visit www.esomar.org.

ESOMAR will hold its Big Data World conference on **November 15-17** in **Berlin**. Visit www.esomar.org.

IIR will hold its OmniShopper International event on **November 15-17** at the London Marriott West India Quay Hotel in **London**. Visit marketing.knect365.com/omnishopper-intl.

The Strategy Institute will hold its Fifth National Summit on Data Analytics for Healthcare event on **December 7-8** in **Toronto**. Visit www.healthdatasummit.com.

QRCA will hold its 2017 QRCA Annual Conference on **January 18-20** at the JW Marriott Los Angeles L.A. LIVE in **Los Angeles**. Visit www.qrca.org.

The 2017 Pharma CI Europe Conference and Exhibition will be held on **February 21-22** at the Prague Marriott Hotel in **Prague**. Visit europe.pharmaciconference.com.

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

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10 minutes with...

Cara Woodland

Global Voice of the Customer Manager, Columbus McKinnon Corporation

"From senior leadership to our manufacturing plant workers, there is a recognized need to be more customer-centric and they have all embraced the opportunity to interact and better understand our end user."

Read the full interview at quirks.com/articles/2016/20160722.aspx.

What was your journey to becoming the global voice of the customer manager at Columbus McKinnon Corporation?

I spent the first 10 years of my career consulting with Fortune 500 companies to help them better understand their customers' needs, wants and pain points and put those insights into action by either filling their product pipeline with potential new product concepts or developing more impactful marketing strategies. Following this, I worked on the client side in finance and banking to help business leaders apply marketing and market research insights to positively impact customer engagement, customer experience and internal processes. After a merger in the banking world, I was given the exciting opportunity with Columbus McKinnon to build the company's global voice of the customer program and partner with the organization as it becomes more customer-centric, invigorates its product line and meets strategic objectives.

Talk about a recent win for the voice of the customer program and what you learned from it.

Columbus McKinnon is a well-established organization and a formal voice of the customer process is a newer concept to us. With any new program, you would expect some resistance to a new process and change. However, from senior leadership to our manufacturing plant workers, there is a recognized need to be more customer-centric and they have all embraced the opportunity to interact and better understand our end user. In addition, the team has been excited to learn how voice of the customer can impact areas beyond the traditional "fuzzy front-end" of product development. This has made a typical uphill climb for my role much easier.

What is the biggest challenge when looking to connect with customers within your industry?

Conducting business-to-business research is typically a more difficult endeavor. However, accessing our end users adds an additional layer of complexity for us. Given that Columbus McKinnon is an industrial manufacturer of hoists, chain and rigging products, our end users tend to be manual labor workers in large companies in industries such as manufacturing, heavy construction, mining, oil, gas and entertainment. Many of these industries, such as automotive, have a very real concern with competitive intelligence leaks, which increases resistance to research. There are also safety concerns when using our product, as it is used to lift and secure heavy objects in extreme conditions, dangerous environments, tight spaces and remote locations. Many companies either do not have the space, are not in accessible locations or are not willing to take the risk of having additional people in their work environment.

In addition, the company has traditionally sold its products through distributors or channel partners and although they are an important voice and part of our value chain, most of our end-user information has come through them rather than through regular contact with our end user. Given this, we do not have a solid end user base to build from and not only have a unique challenge of finding end users but then in getting approval to interview or observe them in action in their work environment

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