Making a business case for CX

Inside the patient's journey

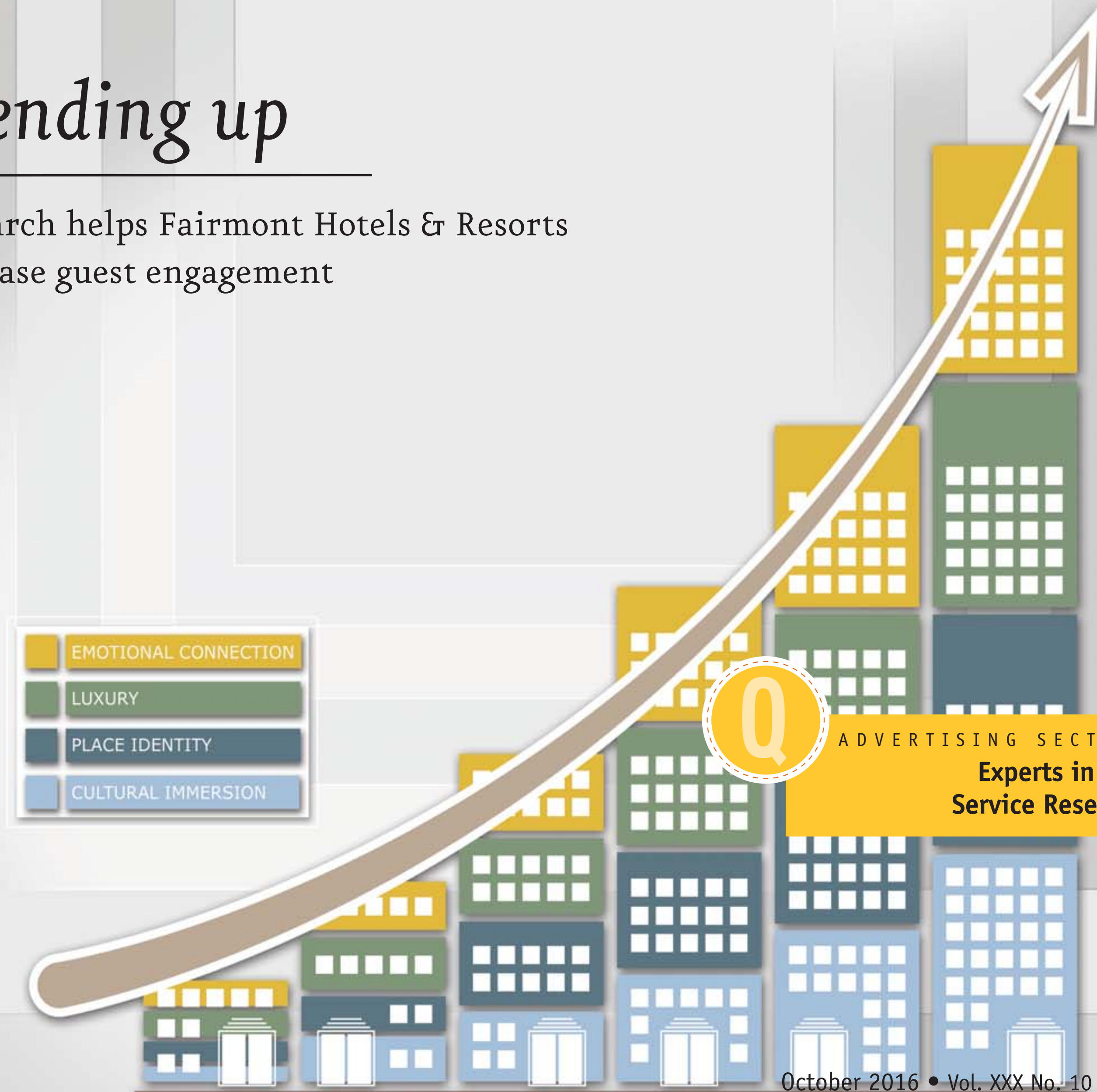
How did the gamified survey do?

QUIRK'S

Marketing Research Review

Trending up

Research helps Fairmont Hotels & Resorts increase guest engagement



ADVERTISING SECTION
Experts in Full Service Research

October 2016 • Vol. XXX No. 10
www.quirks.com

CONTENTS

Quirk's Marketing Research Review
October 2016 • Vol. XXX No. 10

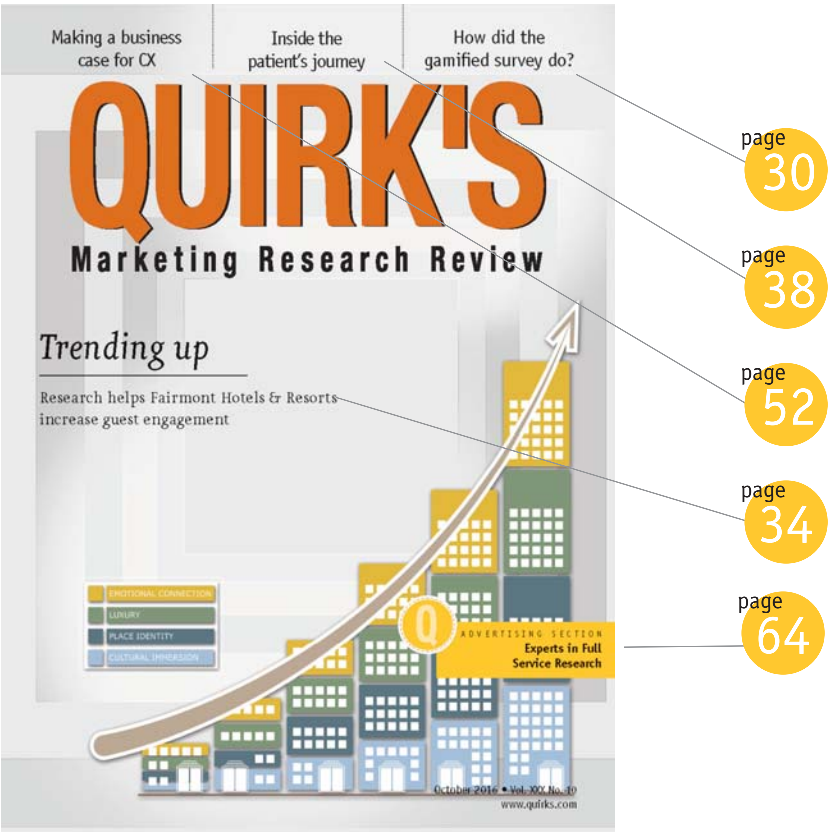


Illustration by Jennifer Coppersmith Design

ON THE COVER

case study

TECHNIQUES

COLUMNS

DEPARTMENTS

Quirk's Marketing Research Review
4662 Slater Road | Eagan, MN 55122
651-379-6200 | www.quirks.com

Publisher • Steve Quirk
steve@quirks.com | x202

Editor • Joseph Rydholm
joe@quirks.com | x204

Digital Content Editor • Emily Koenig
emilyk@quirks.com | x210

Circulation Manager • Ralene Miller
ralene@quirks.com | x201

Production Manager • James Quirk
jim@quirks.com | x206

Directory Sales • Ilana Benusa
ilana@quirks.com | x213

V.P. Sales • Evan Tweed
evan@quirks.com | x205

Sales • Lance Streff
lance@quirks.com | x211

••• moving? make sure Quirk's comes with you!
Send change of address information to subscribe@quirks.com

Download the Quirk's iPad, iPhone or Android app to view this issue.

An interactive downloadable PDF of this magazine is available at www.quirks.com/pdf/2016010_quirks.pdf.

Follow us on Twitter @QuirksMR.


What if we told you she can't read?
Using the latest consumer research techniques can show you more. The noisy kids. The work-at-home husband. The big game on TV. So it's no wonder she can't get any reading done… unless she's at a coffee shop.
Learn to find the real story behind your consumers. At the Burke Institute.
800.543.8635 | burkeinstitute.com
Real Learning. Burke Institute.
a division of Burke, Inc.
BURKE INSTITUTE
DISCE DOCE
© 2016 Burke, Incorporated. All rights reserved.

CLICK WITH QUIRK'S

••• online, e-newsletter and blog highlights

••• internet/web

Quirk's announces launch of new Web site

If technology doesn't fail us, by the time you read this article Quirk's will have an entirely new Web site.

We've spent the past three years analyzing data, gathering feedback and testing new and innovative Web software. The result is a new site with a robust and intelligent search feature at its core.

The new search suggests options right in the search field. As a result, we've been able to simplify the look and feel of the site, making it easier to navigate.

When searching a keyword, you can drill down to see just the articles, suppliers, multimedia or events that match. Everything – including our blogs – is hosted on quirks.com to make it easy to find and share all of Quirk's content.

Understanding that change can be hard, we've purposefully kept many of our old sections and layouts. Over the next 12 months these sections will be updated and replaced, easing the transition for users. The best part of this new platform is that it uses cutting-edge technology, including mobile and search engine optimization, and can accommodate the anticipated growth of our site, which is already the most visited in the industry.

// E-newsworthy

5 reasons focus groups will never disappear

www.quirks.com/articles/2016/20160925-2.aspx

What makes a great MR vendor? Quirk's readers react to article

quirks.com/articles/2016/20160625-1.aspx

Goodbye, alpha-male: How researchers can engage the man of 2016

www.quirks.com/articles/2016/20160925-3.aspx

// Noted Posts

QuirksBlog.com

Digital revolution stimulates change in shopper marketing

quirksblog.com/blog/2016/08/25/

Who embodies the value of U.S. patriotism?

quirksblog.com/blog/2016/06/30/

Big ideas, real-world solutions. Now in two locations!

quirksblog.com/blog/2016/06/15/

ResearchIndustryVoices.com

Does your team understand the difference between correlation and causation?

researchindustryvoices.com/2016/09/01/

Connecting with eco-friendly audiences

researchindustryvoices.com/2016/08/12/

Bringing out the best in focus group participants

researchindustryvoices.com/2016/08/26/

ResearchCareersBlog.com

Scream it from the rooftops! Market research is cool

researchcareersblog.com/2016/08/22/

15 tips for stressed-out professionals

researchcareersblog.com/2016/08/03/

5 job reference etiquette rules to follow

researchcareersblog.com/2016/07/18/

*TCPA compliant

MULTIMODAL DATA COLLECTION CAPABILITIES: IN-PERSON, INTERNET, MAIL, MOBILE, TELEPHONE*

In Case You Missed It

news and notes on marketing and research

••• hispanic research

Smiles in the aisles for Hispanic grocery shoppers

A study by sales and marketing agency Acosta, Jacksonville, Fla., and media company Univision Communications Inc., New York, shows that Hispanic shoppers enjoy grocery shopping more than their non-Hispanic U.S. counterparts, with 68 percent of Hispanic shoppers – and seven in 10 Hispanic Millennials – saying they enjoy grocery shopping versus 59 percent of total U.S. shoppers. While 39 percent of U.S. shoppers report shopping alone, 79 percent of Hispanic shoppers go grocery shopping with someone else, such as a spouse, child or friend. Eighty-eight percent of U.S. Hispanic Millennials do the same, making them the most likely of all the generations to go grocery shopping with companions. The study also found that Hispanic shoppers are more engaged than other U.S. shoppers with digital tools – including social media – along the grocery path to purchase. Thirty-three percent of U.S. Hispanic shoppers research a new grocery item online versus 22 percent of total U.S. shoppers. Additionally, 35 percent of U.S. Hispanic shoppers read their grocery retailer's digital circular versus 30 percent of total U.S. shoppers.

quirks.com/articles/2016/20161001.aspx

••• health care research

Docs prescribe more attention to burnout

According to a microsurvey by InCrowd, a Boston-based provider of market intelligence to life sciences and health care firms, 74 percent of U.S. primary care physicians and ER doctors do not feel their health care facility or practice is taking effective steps to address and prevent burnout. Burnout was defined as decreased enthusiasm for work, depersonalization, emotional exhaustion and a low sense of personal accomplishment. The findings also show that 57 percent of the primary care and emergency medicine doctors surveyed – two of the specialties reporting the highest burnout rates – said they have personally experienced burnout. An additional 37 percent of respondents said that while they personally hadn't experienced burnout, they know others who had. Additionally, 37 percent of respondents said they felt frustrated by their work a few times weekly or every day, according to the findings, and 58 percent of respondents were either unsure if they would recommend a career in medicine to a child or family member or knew they would not. Time pressures and electronic medical records, respectively, were most frequently reported stressors.

By Joseph Rydholm, Quirk's Editor

Witnessing the might of the Chinese consumer

©Clare Pix Photography www.clarepix.com

Joe Rydholm can be reached at joe@quirks.com

In 2006, my wife and I traveled to China to adopt our oldest daughter. This summer our family returned to China for what the adoption community calls a homeland trip, the purpose of which is to give your adolescent child a chance to explore their birth country and its culture and, when possible, reconnect with any caregivers they may have had there.

It was an amazing trip, to say the least.

Prior to China, we spent a week in Taiwan, the birth country of our youngest daughter, whom we adopted in 2008. Though her homeland trip wasn't really in the cards for a few more years agewise we figured we might as well work it in since we were going to be, in a manner of speaking, in the neighborhood.

Our itinerary in China took the four of us to cities such as Beijing, Xi'an, Chengdu, Guilin and Wuhan. We had been to Beijing and Wuhan previously (our daughter's birth province is Hubei, of which Wuhan is the capital) and in both cities, I was floored by level of growth and change that had occurred in the 10 years between our visits.

In 2006, when we journeyed the 150 kilometers from Wuhan to our daughter's birth city with the other adoptive families in our travel group, it was a four-hour ride in an aging mini-bus over a narrow, poorly-paved concrete highway. This summer, we fairly zipped there in just over two hours in our driver's minivan, thanks to the impressive eight-lane freeway that now connects the two cities. Similarly, we rode in comfort on a massive new freeway on our trip to revisit the popular Badaling section of the Great Wall.

Our hotel in Beijing was near the gleaming Beijing apm mall (the apm comes from the combination of am+pm; the mall's slogan is "Play more, sleep less") and while visiting a mall anywhere is never my idea of a good time, necessity landed us there more than once. Each time we entered, I marveled at the hip and heavily Westernized attire of my fellow shoppers. Everyone seemed to be wearing or shopping for brand new sneakers, baseball caps and other clothing bearing the logos and labels of popular U.S. sports franchises and players. The mall was bustling at all times of the day, from the Apple store on the first level to the DQ in the food court.

There also seemed to be a lot more cars in Beijing this time around. And not just typical, standard makes but expensive marques like Jaguar, Mercedes and Range Rover. Beijing's smog problem has been well-documented and after witnessing the gridlock in many areas around the city this summer, it's clear Beijingers have fallen in love with the automobile.

Beijing's hosting of the Olympics in between our two visits no doubt accounts for a lot of the growth and change I witnessed – but not all of it. Indeed, there were similar signs in each of the other major cities that we visited. One of the highlights of our trip was a visit to an elementary school in Xi'an, where our travel group (our family and four other adoptive families) was treated to songs and skits performed in English by the students, most of whom could have easily passed for their U.S counterparts, thanks to their smartphones and trendy clothes.

Keep it rolling

Granted, these examples from my foray into cultural ethnography are purely anecdotal – more qualitative than quantitative, if you will – but it was quite compelling to see with my own eyes the trends I had been reading about in the business press. While there are rumblings that macro forces like the government's cheap-money policy and a real estate bubble could derail the growth train, my bet is on Chinese consumers to keep it rolling. Having seen them in action firsthand, I don't think they'll be slowing down any time soon.

quirks.com/articles/2016/20161002.aspx

IN FOCUS

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

Q // Survey Monitor

••• b2b research

B2B marketers feeling the pressure

Report outlines the hurdles they're facing

As marketing budgets and spending return to pre-recession levels, B2B marketers feel increasing pressure to justify their activities and results, according to a report from Forrester's Laura Ramos, as featured in a MediaPost Research Brief. In a 2016 budget survey, 56 percent of the B2B marketers who responded said that attributing program spending to revenue results is their top challenge, up from 45 percent in 2015. When B2B marketing executives can't definitively quantify what their company gets in exchange for the budget dollars spent on in-person events, sponsorships, advertising and sales support, CFOs see marketing as a cost center, sales execs see marketing as a resource diversion and CEOs don't consider marketing a strategic part of the management team. Marketing execs might have great motivation but several factors make measuring marketing's impact a constant struggle, points out the report.

Marketers face a deluge of data. The number of channels that B2B marketers use to reach and collect information about customers has grown rapidly in the past decade. The most recent budget survey respondents report using an average of 9.4 tactics out of the 17 considered. Channel-centric marketing tools generate unique sets of metrics that are difficult to integrate into a cohesive view of customer information and engagement. The tons of social, mobile and digital data that buyers throw off as they investigate purchase options only increase the scale of the problem.

Messy internal data is difficult to manage. To make matters worse, says the report, mergers, acquisitions and technology investments have turned the systems used to collect and analyze the resulting data into a hodgepodge of disconnected tools. This makes it a huge challenge to collect, aggregate and house data, while raising questions and concerns about the reliability and validity of that data. Without the services of a B2B data management specialist, the process of merging, unduplicating, standardizing and augmenting data can spin out of control and can cost a large enterprise hundreds of thousands of dollars to get it back on track.

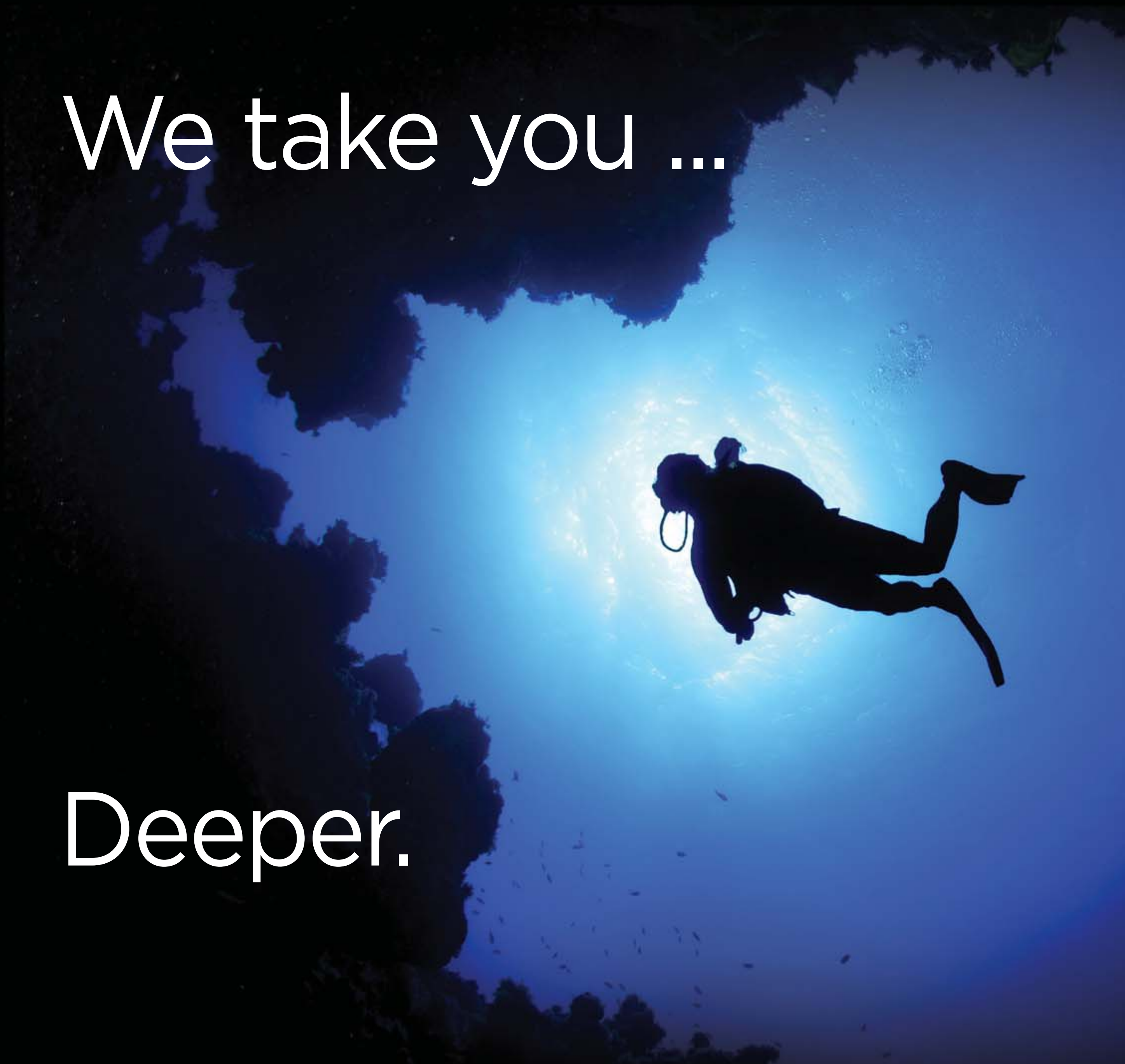
Many marketing teams remain deficient in analytical skills. Analytics is not a historical skill set of B2B marketing departments, notes the report. Many marketers lack an analytics background, especially those who rose through the ranks of marketing communications and branding. In research conducted on how marketers manage performance, only 10 percent of respondents felt that their marketing teams were effective at using data analytics to make decisions.

The role of marketing continues to change. Long sales cycles in which buyers take nonlinear paths to explore solutions and need to engage multiple decision-makers further complicate how marketing must attract and engage buyers.

"Every organization has a vision for how marketing should help the firm achieve its goals but it is not often articulated very clearly," says Pat LaPointe, former managing partner at MarketingNPV and executive vice president at MarketShare.

But, says the report, marketers don't

quirks.com/articles/2016/20161003.aspx


We take you ...
Deeper.

measure the right things. Most get stuck measuring activity, not value: 61 percent of the marketers surveyed admitted that most of their data work went into reporting on how they did, not showing how marketing drives better business results. This tendency, and the challenges described, constrain marketers from measuring the things that really matter to the company.

Instead, says the report, they:

Measure only what's easy. Marketers gravitate to measuring the things for which they know they can get data. They rely on the individual metrics and reports generated by each tool they use, such as Web analytics to measure visitors or page views and e-mail systems to measure e-mail open rates and click-throughs on offers.

Focus too narrowly on funnel metrics. Most B2B marketers surveyed try to prove marketing's value by reporting short-term operational trends like sales pipeline (72 percent), marketing spend (58 percent) and return on program investments (51 percent). Fewer than 20 percent of respondents include metrics that take a longer-term view, such as marketing's contribution to retention, market share or category ownership, to track the forward-looking health of the business.

Track quantity over quality. Marketers commonly use quantitative measures like inbound traffic, attendees at events, social media followers and marketing-qualified leads to benchmark the results of their marketing activities. However, says the report, lead conversion rates, customer retention and account penetration measures better prioritize programs that result in strong sales opportunities among both prospects and current customers.

Fail to measure factors that lead to improved performance. Monitoring awareness, preference, consideration, market sentiment and customer satisfaction and loyalty are conventional performance management tasks that help marketing execs understand brand impact. However, this activity falls short among the marketers surveyed, as it fails to measure and report the results that matter more to CEOs and board members, like increases in customer lifetime value (15 percent) and cross-sell/upsell opportunities (25 percent).

••• financial services

Consumers glum on post-election financial outlook

We lose no matter who wins

Nearly two-thirds of U.S. consumers believe their financial health is poised to deteriorate in 2017 regardless of who wins the presidential election this year, according to findings from an IRI Consumer Connect survey from Chicago researcher IRI. In contrast, consumers have been feeling a bit more optimistic about their personal finances and putting the Great Recession behind them for the past couple of years.

Overall, 64 percent of consumers believe their households' financial health will decline if Donald Trump is elected compared to 60 percent of consumers if Hillary Clinton is elected. In addition, 36 percent believe their households' financial health will improve if Trump is elected compared to 40 percent if Clinton is elected.

"While Americans' attitudes towards personal finances have improved in recent years, this election process appears to signal a shift in consumer sentiment," says Susan Viamari, vice president of thought leadership for IRI. "The changing of the guard at the White House always represents uncertainty but this year close to 60 percent of consumers feel that their financial health will deteriorate no matter who is elected president. This will absolutely impact retailers and CPG manufacturers, as they brace for a tightening of the purse strings."

IRI has for several years studied the types of trade-offs that consumers make when they feel their budgets are being squeezed. Some behaviors, such as list-making and shopping at multiple stores, become part of the regular routine, even when finances are looking stable or are improving. The following are shopping behaviors that consumers say they will be adopting: 62 percent of consumers who think their finances will decline say they will make written shopping lists, compared to 59 percent who think their finances will improve; 75 percent of consumers who think their finances will decline say they will buy needed items when they are on sale to save money, compared to 54 percent who think their finances will improve; 62 percent of consumers who think their finances will decline say they will purchase private label products to save money, compared to 41 percent who think their finances will improve; 48 percent of consumers who think their finances will decline say they will try new, lower-priced brands to save money, compared to 36 percent who think their finances will improve; 38 percent of consumers who think their finances will decline will visit multiple retailers to keep the grocery bills down, compared to 35 percent who think their finances will improve.

Consumers still want to treat themselves and will continue to splurge on indulgences. Those with a sunnier outlook on their finances are looking for stores that offer the following selection of luxuries: 56 percent of consumers want gourmet food and beverages; 55 percent of consumers desire local/artisan food and beverages; 51 percent of consumers require prepared/easy-prep meal solutions; 51 percent of consumers fancy natural/organic food and beverages; 48 percent of consumers wish for technology that would make shopping the store more exciting; 39 percent of consumers would like the ability to purchase online and pick up in store.

During the Great Recession, younger consumers had the most pessimistic outlook. However, the tide is definitely turning as the latest IRI survey results found that younger consumers are now more optimistic than older consumers about their personal finances in the next six months prior to the inauguration of a new president. A full 78 percent of consumers aged 18-34 and 69 percent aged 35-54 believe their households' financial health will improve in the next six months, compared to 60 percent aged 55 and up. Thirty-eight percent of 18-to-34-year-olds and 31 percent of 35-to-54-year-olds are willing to pay more for food/beverages that are natural and organic compared to 21 percent of those aged 55 and up. Fifty-eight percent of 18-to-34-year-olds and 52 percent of 35-to-54-year-olds are willing to pay more for OTC medications that treat multiple symptoms compared to 43 percent of those aged 55 and up.

Still, these younger consumers are willing to make trade-offs to save money. After all, they have come up in a very conservative place in time and frugality is becoming programmed into their CPG shopping journey: 53 percent of 18-to-34-year-olds and 51 percent of 35-to-54-year-olds buy beauty products that are not their regular brands because they're on sale compared to 40 percent of those aged of 55 and up; 59 percent of 18-to-34-year-olds and 48 percent of 35-to-54-year-olds buy food/beverage brands that are not their preferred brands because they have a coupon compared to 41 percent of those aged 55 and up; 54 percent of 18-to-34-year-olds and 46 percent of 35-to-54-year-olds buy OTC medications that are not their preferred brands because they have a coupon compared to 36 percent of those aged 55 and up.

"When it comes to decoding the consumer mind-set, there is perhaps nothing more complicated than predicting how a significant transition, such as electing a new president, will impact the way consumers feel and behave," says Viamari. "CPG manufacturers and retailers must be more vigilant than ever as the torch is passed, and ready to respond in real time to shifting attitudes that ripple through the marketplace."

The IRI Consumer Connect survey is a quarterly survey designed to gauge consumers' financial confidence and understand how their financial situations are impacting the way they shop for, purchase and consume CPG products. It is an online survey of more than 2,200 nationally representative respondents. The Q2 2016 survey was fielded the first half of June.

••• automotive research

Auto tech excites, concerns car-buyers

Lack of awareness may hamper acceptance

Technology-savvy consumers are increasingly motivated by advances in automobile tech, particularly around safety and convenience, when making a new car purchase. But a lack of familiarity with connected vehicles and some lingering privacy concerns around these technologies remain as obstacles to wider adoption and increased sales, according to the 2016 Nielsen AutoTECHCAST Report, an annual study of consumer preferences focused on advanced and emerging automotive technologies. The AutoTECHCAST survey was conducted during the second quarter of 2016 and encompassed nearly 12,000 U.S. new car buyers and looked at 44 auto-related technologies to examine the latest industry trends and uncover the reasons behind them.

"Consumers are becoming more interested in advanced automotive technologies than ever before and are increasingly factoring these technologies into their purchasing decisions," says Mike VanNieuwkuyk, vice president, Nielsen Automotive. "Manufacturers need to continue to educate auto shoppers about the technologies that appeal to their personal interests and desires in order to distinguish their products from competitive options and build stronger brand loyalty with these tech-savvy consumers."

While advanced automotive technologies are on the rise, consumer awareness of many automotive technologies is not as widespread as some might think. The Nielsen report found that base familiarity is low, with just 25 percent being extremely or very familiar with these technologies.

However, familiarity with technology related to safety and connectivity has been on the rise. According to the report, the top five most recognizable advanced technologies are rear-camera mirrors, smartphone-linked media functionality, blind spot detection and prevention systems, surround view camera systems and smartphone-navigation vehicle interfaces.

Survey respondents were the least familiar with technologies involving comfort and fuel efficiency. The report revealed the bottom five technologies were gesture/motion controls, energy recovery suspensions, active wheel shutters, active front grille shutters and car-mounted solar panels.

Beyond automotive technologies that are related to safety and connectivity, consumers are far less familiar with other futuristic advancements. A lack of awareness around many of these technologies may be hampering their wider acceptance, raising the need to better educate consumers.

When it comes to future vehicle selection, safety – particularly accident prevention technologies – is growing in consumer interest. The AutoTECHCAST Report found that safety is among the top criteria for consumers when shopping for a new vehicle and has risen 5 percent since 2014. "Advanced technology/features" is also on the rise, up 3 percent over last year. Furthermore, half of the top 10 individual technologies of interest are safety-related.

While vehicle price and reliability remain important factors with consumers, they are also viewed as characteristics that are expected. The report uncovered an increase in the importance of corporate reputation, which rose to 10 percent in 2016 from 8 percent last year. "Consumers are becoming much more interested in the reputation of the company they purchase their vehicle from," says VanNieuwkuyk. "More than half of the respondents we spoke to indicated that car manufacturers are making good choices when it comes to safety, which really bodes well for industry reputations in general."

While familiarity with connected cars has been on the rise, the report shows that nearly one-third of consumers have never heard of these technology-enabled vehicles. These consumers don't know what connected cars do and are not associating vehicle brands with infotainment badging. This highlights the need for manufacturers to better promote their branded infotainment systems and find more effective ways to market system-specific features to vehicle owners in order to raise awareness of connected car functionality.

Another issue facing connected cars is skepticism around protecting the consumer's privacy. Nielsen found that nearly two in three consumers surveyed are not willing to share information over fears their privacy would be comprised. Manufacturers will need to further educate consumers about the benefits of connected cars and reinforce privacy options available around how data is collected and security measures that are already in place in order to build trust and ease concerns.

The report found that advanced technologies are highly appealing to Millennials and affluent buyers. "Automotive tech offers manufacturers an important tool for staying competitive and relevant, while appealing to the newest generation of consumers who are extremely technology savvy," says VanNieuwkuyk. "This year's report highlights growing expectations by today's consumers around safety and connectivity-related technologies. This rising awareness presents the industry with an important opportunity to refine their message and fine-tune promotions that drive excitement for advanced technologies."

The Nielsen AutoTECHCAST Report is an annual multi-client study platform to collect and analyze consumer insights on advanced automotive technologies and features. The 2016 study includes 44 technologies. A total of 11,886 U.S. consumers completed the study utilizing Nielsen's Harris Poll Online panel members, as well as additional preferred partner sample. The average survey length ranged from 35 to 40 minutes. Data were collected between March 22, 2016 and April 27, 2016. Data was weighted by demographics and a propensity score to ensure that respondents are representative of the total in-market vehicle buying population.

••• grocery research

Let's talk about Skittles

NetBase charts food mentions on social media

Santa Clara, Calif.-based analytics firm NetBase released its first NetBase Food and Beverage Brand Industry Report 2016, which examines social media conversations of the top food and beverage brands across six different grocery aisles. The report reveals that the most-loved brand was Skittles, which beat out its chocolate competitors, followed by Budweiser, Red Bull, Pringles and Coca-Cola, which topped Pepsi.

To build the report, NetBase examined more than 84 million mentions across social networks, review sites, blogs and forums between June 22, 2015 and June 21, 2016. It then ranked 72 of the most-loved food and beverage brands from the following grocery aisles: adult beverages, non-alcoholic beverages, candy, cereal, dairy and snacks.

Consumers go to the grocery store at least 1.5 times a week. Therefore, food and beverage brands are constantly competing to be top-of-mind and by leveraging social to understand their target audiences, brands can act on market signals and have more consumers put their products in their carts.

Key findings from the report include:

Beverages dominated the top 10. More beverage brands were ranked in the top 10 spots than any other aisle with Red Bull (#3), Coca-Cola (#5), Pepsi (#6), Mountain Dew (#9).

Breakfast was the meal or snack most associated with healthy eating. The top brands mentioned alongside health were Cheerios (#19), Silk (#23), Quaker Oatmeal (#32).

Conversation drivers changed by aisle. Health concerns were only raised around dairy products, while humor was the biggest conversation driver for snacks.

Wine brands have room to grow in social. Wine brands like E&J Gallo had a highly favorable net sentiment but had low overall volume of mentions.

The NetBase Food and Beverage Brand Industry Report 2016 is based on brand conversations across Twitter, Facebook, Tumblr, blogs, forums, news and review sites between June 22, 2015 and June 21, 2016.

••• financial services

Millennials display Depression-era money views

Trading 'Back in my day…' stories?

Millennials may have more in common with their Depression-era counterparts than their Boomer parents or grandparents, according to findings from the TD Ameritrade Millennials and Money Survey. Of the more than 1,000 Millennials surveyed: sixty-two percent identify as savers; 80 percent have a budget; the vast majority don't feel financially secure now but expect to be in the future (85 percent); nearly half are anxious about debt (47 percent); and more than three-quarters would stash an extra $1,000 in a savings account instead of the stock market (77 percent).

"The Silent Generation and Millennials came of age during a major financial crisis, which increases the propensity to save and financial conservatism," says Matthew Sadowsky, director of retirement and annuities at TD Ameritrade Inc., a broker dealer subsidiary of TD Ameritrade Holding Corporation. "Further adding to Millennials' financial anxiety is the economy, student debt, and escalating peer influence from social media."

They're not just keeping up with the Joneses – they're keeping up with everybody. Thanks to social media, Millennials feel social pressure to spend or keep up with others more so than elder generations. Social media is much more likely to cause Millennials to compare themselves to others than Boomers (64 percent vs. 29 percent). Nearly a quarter of Millennials feel pressure to keep up with the spending habits of their friends (24 percent). Fifteen percent of Millennials admit to spending money to make a good impression. To the statement "I need a somewhat substantial/substantial amount of money above the minimum needed for essentials," 57 percent Millennials agreed vs. 34 percent of Boomers.

Millennials are more likely than Boomers to report having spent more/not saved as much in a month than they wanted to (56 percent vs. 29 percent say this happens very often/somewhat often).

Who do they listen to? How do they invest? Millennials consult parents (38 percent) and/or friends (28 percent) for financial advice while Boomers are more likely to consult a professional advisor. Millennials are more likely to feel confident investing using a combination of online and human contact than Boomers (40 percent vs. 33 percent).

Millennials view home ownership as important and have realistic views of retirement savings hurdles. Two-thirds of Millennials are saving for a down payment on a home (66 percent). Millennials consider 29 the ideal age to become a homeowner. Almost half are concerned about running out of money in retirement (49 percent). More than half are willing to retire later to maintain their desired retirement lifestyle (53 percent).

Millennials and Boomers are on the same page when it comes to many financial attitudes. Saving, as opposed to spending, makes Americans feel secure and, as a result, happy (80 percent). The No. 1 reason to save is to have the confidence you can meet your financial obligations whatever happens (66 percent). Millennials and Boomers are optimistic about feeling financially secure in the future (41 percent overall).

"Millennials were in a position to learn the value of financial preparation, having grown up in the aftermath of a recession. The qualities they have developed like budgeting discipline and a realistic outlook on retirement may well pave the way toward their financial future," Sadowsky says.

IN FOCUS

Product and Service Update

••• telephone/online research

FocusVision debuts multimode offering

Can add phone to online

In San Francisco, research technology firm FocusVision now offers interactive voice response technology through Survox IVR for FocusVision, a multimode solution that allows automated phone interviewing to be added to online studies. It lets customers voice their opinions and researchers hear their feedback while maintaining and analyzing the data within the Decipher by FocusVision platform. With the solution, a Decipher online survey can be fielded as an automated phone interview with all data from either mode populating the Decipher database. Researchers can widen their addressable market and increase response rates by allowing the respondent to choose the reply vehicle most convenient for them. For inbound surveys, a retailer can, after a point-of-sale transaction, include at the bottom of the receipt an invitation with an 800 number to an automated phone interview and a URL to a Web survey to record the customer's experience. For outbound-driven survey, the solution can extend the strategic reach of online surveys by recruiting respondents from under-represented groups into the study.
www.focusvision.com

quirks.com/articles/2016/20161004.aspx

••• shopper insights

New tool for natural-products retailers

Integrates surveys with segmentation

SPINS, a Chicago-based retail consumer insights firm for the natural, organic and specialty products industries, and its partner, Chicago researcher IRI, have launched a shared shopper intelligence solution for natural retailers. The consumer research tool is driven by SPINS' natural-product attribution and IRI's household panel, Consumer Network, consisting of 100,000 consumer panelists, combined with loyalty shopper data. The combined effort integrates survey responses with of-the-moment buying behavior and SPINS' market segmentation, providing an expanded view of consumer shopping habits.
www.spins.com
www.iriworldwide.com

••• customer experience

MaritzCX partners for predictive offering

Uses AI to build models

MaritzCX, a Salt Lake City customer experience company, has made available PredictionCX, a solution that helps businesses analyze known customer information, use it to predict customer behavior and take action to improve customer experience for individual customers. MaritzCX is partnering with PurePredictive, an analytics technology provider that uses artificial intelligence to automate the building of predictive models using machine learning, to deliver part of the PredictionCX solution. PredictionCX is integrated into MaritzCX dashboards and case management to provide a customer recovery system through a closed-loop process.
www.maritzcx.com

••• health care research

Eye care panel from Research Now

Includes patients and professionals

Plano, Texas, firm Research Now has launched a new eye care panel that enables health care researchers to monitor health practices, treatments and sentiments. The panel will be available in the U.S., Canada, U.K., Spain, Italy, France and Germany. Through the new panel, Research Now will provide access to a globally-targeted audience of patients who suffer from the most common eye diseases or complications such as dry eye syndrome, glaucoma, cataracts and other visual impairments. The panel also includes eye care professionals such as general practitioners, ophthalmologists and opticians.
www.researchnow.com

••• political research

Election-tracking product from SurveyMonkey

Includes state-level data

Palo Alto, Calif., firm SurveyMonkey has launched Election Tracking, a self-serve polling product that lets subscribers access polling data for the 2016

U.S. presidential, Senate and gubernatorial elections. The product uses over 10,000 interviews collected every week to give customers tools to understand the elections. In all, SurveyMonkey will interview about 2 million voters, with respondents randomly selected from the responses the platform receives every month. In addition to national data, the product includes state-level data in battleground states and in the 34 states with Senate races and 12 states electing governors this fall. The product is overseen by Jon Cohen, chief research officer of SurveyMonkey, and the firm's Head of Election Polling Mark Blumenthal.
www.surveymonkey.com

••• pharmaceutical research

Text analytics for pharma

Identifies co-occurrences

Text analytics solutions firm Lexalytics, Boston, has debuted the Pharmaceutical Industry Pack for market research, social media marketing, customer experience management and voice-of-the-customer professionals working in the pharmaceutical industry. Using the firm's natural-language processing and machine-learning technology to approach a human's ability to understand the meaning and sentiment in a text document, the Pharmaceutical Industry Pack helps pharmaceutical companies and marketing agencies gain insights such as identifying co-occurrences of medications, conditions, symptoms and sentiment. The Pack will also uncover whether more patients have a positive experience at certain dosages of certain medications and if patients are being prescribed a medication for off-label symptoms.
www.lexalytics.com

••• Briefly

■ ReviewTrackers, a Chicago-based customer feedback platform, has released Trending Topics, which uses natural language processing and machine learning to analyze the text in customer reviews, surface the most relevant keywords and attach positive or negative sentiment to them in one, easy-to-understand word cloud.
www.reviewtrackers.com

■ Nielsen, New York, has enhanced N-Score, a syndicated solution that assesses the casting and endorsement potential of celebrities (actors, athletes, musicians and well-known personalities). N-Score will now offer a Fan Affinity score that will quantify a celebrity's fan base to fit particular content or brands, providing the industry with a quantifiable way to research celebrities and brands based on fan behavior. The enhancement integrates Nielsen's media and consumer panels, including Scarborough, Homescan and TV panel with N-Score values in order to allow decision makers to evaluate and select talent in a data-driven way. N-Score values are calculated using a proprietary algorithm which considers a number of celebrity characteristics. The Nielsen Fan Affinity score ranks celebrities based on how likely their fans are to watch certain content, exhibit consumer behaviors or have lifestyle preferences.
www.nielsen.com

■ Market research training firm Research Rockstar LLC, Marlborough, Mass., has announced a training portal for market research professionals that gives them 24/7 access to courses, media content and instructors.
www.researchrockstar.com

■ Location intelligence firm xAd, New York, has partnered with Reston, Va., firm comScore on comScore Location Lift in xAd, a global measurement solution that links mobile campaign delivery to in-store visitation. The solution uses comScore's proprietary campaign validation and lift methodology with xAd's Blueprints technology, enabling advertisers to measure the reach and frequency of their mobile campaigns and understand how campaign delivery influenced store visitation based on actual foot traffic into stores. The solution will initially be available globally for mobile campaigns through xAd and will be available at massive scale for desktop and television through comScore in the future.
www.xad.com
www.comscore.com

■ Digital agency Razorfish, New York, has launched a new data intelligence platform, COSMOS, which combines cognitive algorithms, data intelligence and machine learning to create relevant brand experiences across all touchpoints. COSMOS is modular, allowing organizations to deploy the platform at scale or purchase need-based solutions that can be integrated with existing marketing and technology platforms. COSMOS learns, reasons and activates customer insights by introducing cognitive optimizations that drive loyalty, customer retention and experiences. The platform includes the following modules: COSMOS Consumer 360; COSMOS

Audience Intelligence Hub; COSMOS Cognitive Intelligence-as-Service; and COSMOS Universal Graph ID.
www.razorfish.com

■ Harpeth Marketing, Franklin, Tenn., has released its ninth e-book, *"I Hate Selling!" - A Guidebook for Small Business Owners, Independent Consultants, and Other Part-time Sales Reps* that can be downloaded for free from the firm's Web site.
www.harpethmarketing.com

■ Research firm Toluna, Wilton, Conn., has added new features to its DIY survey platform, QuickSurveys. New features include random assignment to allow concept testing without bias by randomly displaying blocks of concepts (including text, videos and images) and/or questions as well as secure video hosting to enable users to safely upload video to their surveys.
us.toluna.com

■ Nielsen, New York, has launched Brandbank into the U.S. consumer packaged goods and retail market, integrated into Bentonville, Ark.-based Walmart's systems as an approved content service provider. Brandbank, a Nielsen-owned company since 2014, provides digital product content for e-commerce Web sites, mobile shopping apps, merchandising and marketing. For Nielsen's clients, Brandbank will capture/ingest, manage and distribute product content on behalf of manufacturers, adhering to Walmart's requirements for data attributes and formats (Walmart Enterprise Spec). As a member of Walmart's Content Service Provider ecosystem, Brandbank will supply content to help Walmart implement its omnichannel product content strategy.
www.nielsen.com

■ Eye-tracking technology firm SensoMotoric Instruments (SMI) has launched Automated Semantic Gaze Mapping (ASGM), an automated analysis solution for mobile eye-tracking data based on its computer vision algorithms. ASGM uses SMI's algorithms to aggregate gaze data from eye-tracking videos and delivers quantitative results for immediate analysis. It is aimed at both academic and commercial users of the SMI Eye Tracking Glasses.
www.smivision.com

■ Customer loyalty program provider Maritz Motivation Solutions, St. Louis, has released the *Insider's Guide to Customer Loyalty*, providing insight and tips on loyalty programs for marketers and brands. To download the PDF version of the guide, visit go.maritzmotivation.com/insiders-guidecustomerloyalty.

■ Online market research courses provider MRII, Ann Arbor, Mich., and the University of Georgia have released a revised module on data collection within both the Principles of Market Research and the Principles of Pharmaceutical Market Research online courses. The module sorts out the strengths and weaknesses of various data collection methods and guides the learner through a process designed to match the data collection method to the client's business problem. The revised module was developed by Pete Cape, global knowledge director at research firm SSI.
www.georgiacenter.uga.edu/courses/market-research

■ St. Louis-based research agency Brädo Creative Insight has introduced its Innovation Lab, a mobile prototyping suite that is equipped to ideate and prototype new products and packaging, including low-tech materials such as clay and pipe cleaners and high-tech 3-D printers, laser cutters, modeling software and food extruders.
www.brado.net

■ The NPD Group, Port Washington, N.Y., has launched its Digital Games Tracking Service, a digital point-of-sale-sourced service that provides the U.S. gaming industry with publisher-sourced data on digital game sales, aggregated from the participants of a digital panel that includes publishers in the industry. The service, which is currently available to participants contributing digital data to the service, provides SKU-level sales data for full-game and add-on content downloads for consoles, portables and PC Games. The Digital Games Tracking Service will allow participating clients to understand the size and growth of the digital market and analyze attach rates and other important metrics.
www.npd.com

■ Reston, Va., firm comScore has announced the U.S. launch of mobile data insights within Plan Metrix, a solution that combines Internet users' actual online behavior with offline information. The combined solution will continue to deliver desktop insights, as well as provide insights into the of-

fline behavior of mobile (smartphone and tablet) users on a monthly basis. Plan Metrix leverages inputs from both Media Metrix and Mobile Metrix, along with a tailored methodology, to deliver desktop and mobile insights that help clients understand the psychographics and demographics of the audiences generated by their sites or mobile apps.
www.comscore.com

■ Salt Lake City customer experience software and services firm MaritzCX has made available SocialCX, a solution that helps customer experience professionals manage and increase positive reviews on social media to enhance online reputation. It also provides a means of identifying, distributing and responding to negative or positive online feedback and reviews. SocialCX focuses on social media sources like popular local review sites and uses a MaritzCX text analytics engine to find, capture and transform unstructured social media data into customer experience insights. SocialCX is fully integrated into the MaritzCX platform. MaritzCX delivers SocialCX in partnership with social media company Podium.
www.maritzcx.com

■ U.K. customer engagement solutions firm Grass Roots and New York-based enterprise feedback management firm Questback have launched Tune, a packaged customer survey solution that enables brands to listen to and act upon their customers' feedback. Tune's engagement-led surveys deliver customer insight through increased response rates, feedback and real-time reporting. Initial sectors being targeted include retail, travel and leisure.
www.questback.com
www.grassrootsgroup.com

■ RTi Research, Norwalk, Conn., has released a new e-book, *Brand Extensions: Finding Opportunity at the Intersection of Demand and White Space*, that can be downloaded free from the firm's Web site.
www.rtiresearch.com

■ San Francisco retail analytics firm Euclid Analytics has introduced Euclid Connect, a Wi-Fi-based platform that allows brands to market more effectively and personalize in-store experiences. By allowing smartphone users to opt-in to guest Wi-Fi through a single login, Euclid Connect enables brick-and-mortar retailers to build a relationship with their shoppers across mediums, personalize their shopping experience and influence the path-to-purchase. Separately, the firm has introduced Euclid Traffic, which enables retailers, malls and restaurants to compare traffic across locations, staff locations more effectively based on visitor flow and evaluate the impact of marketing campaigns on traffic.
www.euclidanalytics.com

■ Nielsen, New York, now allows clients to choose a viewability provider within Nielsen Digital Ad Ratings to create viewable, human, demographic ad measurement that best supports their digital ad campaign goals. Based on client feedback, Nielsen has been working with a number of viewability providers, including DoubleVerify, Integral Ad Science and Moat.
www.nielsen.com

■ Researcher the NPD Group, Port Washington, N.Y., in partnership with GfK MRI, New York, has launched BrandLink, a tool that provides updated data detailing the likelihood that a celebrity will resonate with the fans of specific brands and vice versa. The NPD Group gathers data from consumers every year regarding their celebrity, music, sports, sports team, movie and gaming preferences, as well as brands in key categories such as beverages, automotive, mobile, fashion, beauty and more. GfK MRI provides data that informs brand targeting insights for U.S. advertisers by providing a view of consumers' media choices, lifestyles, attitudes and usage of products in 550 categories. The new BrandLink service combines these two databases, providing data that connects brands, media and entertainment properties and the individual fans of specific celebrities and sports teams.
www.npd.com
www.gfkmri.com

■ Germany-based eye-tracking technology firm SensoMotoric Instruments has introduced an eye-tracking HTC Vive head set with 250 Hz sampling rate, giving professionals and researchers a controllable and immersive environment for visual studies. The HTC Vive with SMI scientific grade eye-tracking allows the integrated study of interaction and perception in a range of sectors, including marketing research, neuroscience, psychology and more. With full control over 360-degree images, videos or interactive environments, users can create and analyze more realistic scenarios to study and train human activities. Immersive environments can also be integrated with motion, manual interaction and biosensors.
www.smivision.com

■ Online panel and survey software firm dataSpring, Tokyo, has launched

surveyon, a mobile survey application developed in partnership with Intage Singapore Pte. Ltd., a subsidiary of research firm Intage Group. The surveyon app provides researchers with a responsive mobile experience for research projects while giving them ways to drive panelist engagement. Panelists are able to complete a short profiling survey, register for panels, manage their profile and track accrued points using the mobile application or via the company's surveyon.com Web site. The surveyon app is available for Android and iOS phones and tablets. Building mobile panels for the surveyon app has begun in Taiwan and Indonesia, with South Korea and other Asian countries to follow shortly.
www.d8aspring.com
www.intage-singapore.com

■ Nielsen, New York, has launched Social Content Ratings, a measure of program-related social media activity across both Facebook and Twitter, with plans to incorporate Instagram insights at a later date. Social Content Ratings is an expanded service that will replace Nielsen Twitter TV Ratings in all markets, including Australia, Italy, Mexico and the U.S. Nielsen uses an evolving set of classifier combinations to measure organic and owned activity on Facebook and Twitter. Classifiers are program-related terms, including accounts, handles, hashtags, talent names and other phrases associated with programs and are systematically identified and applied to measure relevant social activity when a program is airing and on a 24-hour-a-day, seven-day-a-week basis. Nielsen receives aggregated anonymous topic data directly from Facebook and accesses full-fidelity APIs from Twitter to measure total social TV activity across social networks while respecting privacy. Both public social media activity and activity taking place between friends is measured. Facebook Messenger data is not available to Nielsen and will not be included in measurement. Social Content Ratings will also support the analysis of "owned" media strategies by measuring the engagement with content posted by official accounts associated with a program or network.
www.nielsen.com

■ Oslo, Norway, research software company Confirmit and U.K.-based IP contact center solutions firm Sytel have partnered to deliver a series of new CATI features, including Redial, Reconnect and Seamless Survey Switching. Redial enables the interviewer to re-establish a call with respondents and resume the interview in the event the call is cut off. Reconnect allows an interviewer to continue a survey on a new number if the respondent would prefer to speak on a different phone. Seamless Survey Switching enables supervisors to reassign interviewers to a new project without the need to logout or disconnect from the dialer. These new features within the combined solution are immediately available.
www.confirmit.com
www.sytel.com

■ Survey research firm Abt SRBI, New York, has enhanced its capabilities to include data science and emerging data capture technologies. Additionally, the firm has also changed its corporate logo and its headquarters location.
www.srbi.com

■ London research firm Ipsos Healthcare has launched its Nonalcoholic Steatohepatitis (NASH) Therapy Monitor. The new syndicated study will run in the U.S. and EU5 initially, with other markets available on demand. This development comes in response to the growing focus on NASH, a liver disease characterized by rising prevalence, low diagnosis levels and a lack of therapies currently approved for treatment. The new NASH patient chart audit is designed to allow subscribers to understand and track the treatment of NASH as a number of pipeline drugs arrive on the market.
www.ipsos.com

■ Van Nuys. Calif., research firm SoapBoxSample has launched a new physician panel, DocThought. Engineered to provide targeted access, DocThought is a network of medical professionals ready to provide opinions to answer clients' medical research questions. Members will provide feedback about a variety of medical products and services and weigh in on aspects of the medical industry.
www.soapboxsample.com

■ Marketing technology company Amobee, Foster City, Calif., has launched Amobee Triggers, a solution that allows marketers to target and deliver digital campaigns at key consumer mind-set moments based on online and offline data signals. The firm has also introduced an updated brand identity and Web site.
www.amobee.com

Using online collage-building to understand the patient's experience

| By Jonathan Weiser

snapshot

Through a rheumatoid arthritis case study, the author shows how journey-mapping can uncover patients' emotions and experiences at different phases of their medical condition.

Health care marketers are increasingly focused on more patient-centric approaches in order to develop effective ways to bridge the gap between patient and health care practitioner communications. What used to be solely directed to physicians as prescribers and influencers for patients now starts with patients. Here's why: Understanding the patient experience begins with grasping a wide range of emotions and experiences that occur, intensify and evolve at key stages – from pre-diagnosis through diagnosis; to living with the disease and its treatments and managing outcomes; even at the point of imaging what their life will be like beyond the current stage. Effective patient-journey research is about uncovering the deepest triggers of feelings and behavior to enhance the patient experience. This enables health care marketers to develop communications that improve patient-doctor interaction, ultimately leading to greater compliance.

To date, many researchers have relied on in-depth qualitative research for this understanding which, while effective, has drawbacks, including being (1) cost-prohibitive to conduct with many patients (in terms of reach and travel costs) and (2) less conducive to generalization across a broader population.

These drawbacks can be mitigated by reaching a quantifiable sample of patients via an online patient journey-mapping exercise.

quirks.com/articles/2016/20161005.aspx

This approach uses imagery as a catalyst via a custom application of online collage-building to amplify the patient voice and facilitate in-depth expression of patients' experiences, behaviors, emotions and needs at various stages of their condition.

Online exploratory research study

As part of a three-step approach to mapping the journey, 160 U.S. rheumatoid arthritis (RA) patients were solicited to participate in an online exploratory research study. First, patients reacted to a series of standard questions about each of the stages of experiencing RA (e.g., symptoms, location of pain, experiences with health care providers, emotions experienced, type of information sought, etc.). Then they participated in the online mapping exercise where they provided both verbal and visual input about their experience at each stage. This was achieved via an interactive collage-building tool for deeper, more personal, visually-metaphoric self-expression. This technique reduces dependency on rational and conscious thought, therefore eliciting the respondent's inner story. Finally, based on the individual responses to the mapping exercise, patients were segmented (through quantitative analysis), providing greater insight to how various factors impact experience.

Findings from this patient journey-mapping exercise, which allowed respondents to express experiences both visually and verbally, revealed that RA patient experience varies greatly at each stage of their condition:

Pre-diagnosis: Many RA patients feel worry, concern and fear, coupled with a great sense of confusion. They know they are experiencing pain but do not understand its source or cause. For some, pre-diagnosis is a long, drawn-out period, whereas others experience an extreme onset of pain that causes them to seek immediate treatment.

Diagnosis: This is a complicated time for RA patients, characterized by feelings of both relief and fear. The relief comes from an understanding that now they know what they're facing, so they can begin treatment. Their fear comes from understanding that they are living with a chronic condition, may potentially face permanent damage and have to take medication for the rest of their lives.

Post-diagnosis (three months after diagnosis): This tends to be the "figuring it out" time period, where many RA patients start to make lifestyle changes, take medications and see relief. However, others who do not start to feel physical relief associate this period with intense emotional despair.

Living with RA: For many, this period is one of uphill battles, some at peak points. Still, some feel they have their RA "under control" and don't feel as if RA runs (or ruins) their lives. They talk about compromises they have had to make living with the disease.

Future with RA: Most are hopeful that with lifestyle changes and proper medications they can control their condition. Others, however, are less optimistic and fear their condition will continue to get worse and worse.

Four distinct experience paths

Further analysis of respondent emotions reveals participants followed one of four distinct experience paths over time: Gets Better and Better; A Few Pitfalls but Mostly Better; True Roller Coaster; Downhill Battle. Quantitative findings indicate these four pathway-based patient segments differ greatly in terms of demographic profile, experience with RA and their current treatment.

Patients with a more optimistic view (the first two pathway segments) tend to have been diagnosed within shorter periods of time (still optimistic), are more likely to be receiving better treatment (i.e., taking a disease-modifying anti-rheumatic drug/biologic therapy), are more educated and more likely to have commercial health insurance (better access to care). Whereas those who are on the other end of the spectrum tend to be suffering from more severe RA symptoms, are more likely to have already had surgery for their RA, plus are more likely to be taking an prescription or over-the-counter pain medication (as opposed to a disease-modifying anti-rheumatic drug/biologic therapy).

With health care marketers and researchers continuously challenged by time and budget constraints, this method of patient journey-mapping provides a new way to deal with both challenges. First, it outlines a new online approach to tackling complex patient emotional issues, with a robust methodology that includes inherent cost efficiency and faster turnaround. The patient journey was, until not long ago, revealed solely through the eyes of physicians. But now, with an online methodology, the journey provides greater understanding of the patient's own experience, expressed in their voice with visual and verbal storytelling. This approach reaches beyond standard verbal interaction, incorporating imagery and projective techniques in a non-lexical, indirect format to reveal personal feelings and to tap subconscious thoughts, where most emotion is expressed and comprehended. As a qual-quant approach, it can also be augmented with traditional qualitative methods, such as patient IDIs or self-video ethnographies.

This research approach can help health care marketers to better address the needs of individual patients – at specific stages of their condition – by incorporating a more empathetic and deeper understanding of the patient experience into developing brand strategy. Specifically it empowers marketers to: develop more tailored messaging to increase awareness, education and compliance at specific stages of patient experience; create highly-targeted patient support programs to influence improved outcomes; and conduct truly need-driven product development.

Jonathan Weiser is senior research director, healthcare at BuzzBack, a New York research firm. He can be reached at jweiser@buzzback.com.

RAPID RESPONSE RESEARCH

|| *Walmart Buys Jet.com*

Today's business developments—from new competitive threats to emerging market opportunities—play out rapidly, and they wait on no one to catch up.

Fast business demands *fast* answers—about products, competitors, and, of course, customers.

Since 2010, Field Agent, recently named Mobile Research Agency of the Year by MRMW, has operated on a simple but powerful premise:

Fight speed with speed.

"It isn't enough any longer to furnish clients with accurate, insightful answers to their business questions," said Marc Yount, president and COO of Field Agent U.S., "because the 'right' answer at the wrong time is actually the wrong answer."

For this reason, Field Agent's mobile research capabilities emphasize speed along with reliability. This distinctive, which the firm calls "Rapid Response Research," is powered by the combination of crowdsourcing and mobile technology.

"We crowdsource hundreds of thousands of smartphones across the country to get our clients the answers they need, when they need them," said Yount. "After all, part of being a reliable solutions-provider today means being fast."

Just how quickly the company produces results depends on the incidence of qualified respondents in its extensive panel of 800,000 U.S.-based consumers.

"Every project is different," Yount said. "But whereas some research firms talk in weeks or months about the turnaround on certain projects, we usually talk in days, often hours."

●●● *jet-fast insights*

To illustrate, Yount cited the company's recent "rapid response" to Walmart's purchase of Jet.com, the online-only purveyor of household essentials and many other products.

When news broke about the acquisition, still days before its official announcement, Field Agent sprang into action to determine the attitudes of Jet.com users toward the rumored sale.

The mobile research firm first screened the online purchase activity of over 5,000 consumers and, then, targeted 250 Jet.com customers with a quick eight-question survey.

According to Yount, the screening process took approximately three hours, while the survey itself concluded in only seven hours.

"We had overnight insight," he said, "and were able to publish the content just as quickly."

Among other findings, Field Agent's survey of Jet.com customers revealed:

- 98% also shop at Amazon, and 89% patronize Walmart.com
- 63% said Jet.com excels Amazon in price promotions and sales
- 28% said they'd be more likely to shop at Jet.com following the sale to Walmart, but 27% admitted they'd be less likely
- 45% indicated they'd be likely to purchase Walmart private brands through Jet.com

"Because we had the insights within hours of the breaking news," Yount explained, "they were available in time to inform actual decisions about the acquisition.

"That's the value of rapid response research."

Read more about this study on the Field Agent blog.

Image Credit: Walmart | via Flickr

Image credit: Bloomberg | Getty Images

Does gamification offer relief from survey-taking torture?

| By Susanna Warnock and J. Sumner Gantz

snapshot

The authors report on their test of gamified vs. standard questions in a survey about the local dining scene.

Judging by the number of survivalist reality shows – *Naked and Afraid*, *Survivor*, *Ultimate Survival Alaska*, etc. – there is no shortage of 20-40-year-olds willing to be seen on national television struggling to survive – literally!

Now try to find a 20-40-year-old to participate in a survey and you might be better off asking them to strip down and starve themselves for three weeks on television. The survey research industry has gotten a bad reputation of endlessly torturing participants with bad questionnaires – a reputation that is leading to declining response rates and the threat of non-response bias.

Gamification has been discussed as a possible solution to the challenge of reluctant respondents. The idea is simple: make the task of completing surveys less onerous by incorporating more game-like elements to make providing information feel less like an invasive exam and more like a fun and entertaining way to pass time.

There is no standard template for gamified surveys or even a set of accepted gamification techniques from which to draw. Some companies tout proprietary software that is designed with avatars and storylines to mimic a videogaming experience while collecting data. Other researchers have focused on updating the functional features of traditional survey questions (slider scales, card sorts and so forth). Still others have experimented with changes in the wording of questions (incorporating projective techniques, for instance) or with providing overarching narratives to the survey experience (a press conference in which the questions are asked by hypothetical reporters, for instance). The anecdotal evidence from this wide range of gamification in surveys suggests that the techniques have promise in engaging respondents, increasing completion rates, response rates and even in generating a higher quality of data.

For most independent research companies the gamification techniques that require sophisticated software (to create video games, for instance) are inaccessible. But if simple changes in the wording of questions and aesthetics can increase response rates, the method is worth pursuing.

We partnered with New South Research (NSR), an independent marketing research company based in Birmingham, Ala., in order to test a few of these gamification techniques. (We are grateful to Rick Wilson at Paradigm Sample for partnering with us for an early test of gamification techniques. The results of this early test allowed us to refine the techniques and led to this study.) NSR has maintained a panel of research participants for over 25 years and this panel is actively used to recruit focus group participants and conduct a limited number of surveys. In order to test gamification, we launched a survey concerning restaurants in Birmingham using NSR's panel of research participants. Half the prospective respondents were sent an e-mail linking them to a standard-format survey and half were sent an e-mail linking them to a slightly gamified survey.

Based on the previous success of gamification, we expected those who opened the slightly gamified survey would be more likely to complete the

quirks.com/articles/2016/20161006.aspx

Table 1

Proportion of Surveys Completed

among the surveys who completed the first page

	Standard	Gamified	Gap
Gender			
Male	57.4%**	39.3%	18.1%
Female	56.7%**	46.2%	10.5%
Age			
<35	50.5%**	37.1%	13.4%
35-44	54.8%**	41.7%	13.1%
45+	60.4%**	48.2%	12.2%

** denotes statistically significant difference between proportion completing standard and gamified surveys at the $p < 0.05$ level

Table 2

Self-Reported Enjoyment and Likelihood to Recommend

	Standard	Gamified	Gap
Enjoyed			
Much More	26.6%	27.2%	0.6%
Somewhat More	29.8%	34.4%	4.6%
Same	37.2%	32.7%	4.5%
Less	6.4%	5.7%	0.7%
Recommended			
Definitely	37.8%	36.4%	1.4%
Probably	35.0%	40.1%	5.1%
Might	20.7%	15.6%	5.1%
Not Recommend	6.5%	7.8%	1.3%

survey than those who opened the standard survey. Surprisingly, we found quite the opposite. Among those who opened the survey, 49.3 percent completed the standard survey while only 39.0 percent completed the gamified survey.

The pattern holds true, regardless of gender or age. Both males and females were statistically significantly more likely to stay with the standard survey than the gamified survey. Likewise, in every age group, more respondents completed the standard survey than the gamified survey (Table 1).

If the idea of gamification is to reduce the burden of survey-taking by creating a more entertaining experience, the simple techniques we tested failed. The respondents completing the gamified survey were statistically no more or less likely to say they enjoyed the experience or that they would recommend the survey to a friend or family member (Table 2).

The survey we tested included several different gamification techniques and, before we threw out the baby with the bath water, we wanted to know if any of the specific techniques had success. Among the techniques tested were:

Use of images: Images were used in three different ways including simply to improve the aesthetics, to replace words with symbols on rating scales and replace words with logos on a select question.

Competitive elements: Explicit time limits were given on two questions (although no timer was used to disqualify respondents) and an implied sense of urgency was given on a third question.

Projection techniques: Respondents were asked to place themselves in a scenario in order to answer one question.

Feedback: The respondents were given a description of their personality after identifying the importance of several attributes.

Rules: Respondents were asked for a specific number of answers in an open-ended question.

Personalization: Respondents were asked to provide personal advice to the survey writer.

Mixed results

When evaluating the completion rates of each question type, we found mixed results (Table 3). Consistent with our overall findings, the standard format had statistically significantly higher completion rates in several questions that included time limits, rules, projection techniques and personalization.

The standard version...

"Thinking about food culture, what are five adjectives that you would use to describe the food culture in Birmingham?"

...had a higher completion rate than the gamified version:

"Ready for another game? Name five adjectives – no more and no less – that describe the food culture in Birmingham. You have 15 seconds starting when you click 'Continue' below."

The standard version...

"In terms of the restaurant choices, what is important for a city to offer?"

...had a higher completion rate than the gamified version:

"Foodie TV has announced a competition to select the best destination for food. What can your city do to win?"

The standard version...

"Overall would you recommend Birmingham as a destination for an excellent food culture?"

...had a higher completion rate than the gamified version:

"If I could go to any city to eat dinner tonight, would you recommend Birmingham?"

However, it should be noted that the results of other questions that tested some of these same techniques (time limits and personalization, in particular) showed no statistically significant difference in the completion rate between the standard and gamified formats.

The gamified format had statistically significantly higher completion rates in several questions that included an implied urgency and feedback.

Table 3

Proportion Completed Each Question

among those who viewed the question

	Standard	Gamified	Gap
Pg 3: Grid question separated out and introduced with implied urgency ("speed counts!") with aesthetic fonts/colors.	90.4%	96.1%**	5.7%
Pg 5: Grid question separated out and introduced with offer of feedback ("Wanna find out what your restaurant preferences say about you?").	89.9%	94.1%**	4.2%
Pg 10: Personalization added to open-ended question ("What 5 restaurants would you recommend that I try?").	95.7%	97.4%	1.7%
Pg 2: No difference between standard and gamified formats.	92.6%	94.1%	1.5%
Pg 1: Purely aesthetic images added to set of three single-select questions.	86.5%	87.1%	0.6%
Pg 11: Logos replace text in answer choices of multi-select question.	99.6%	100.0%	0.4%
Pg 12: No difference between standard and gamified formats.	99.8%	100.0%	0.2%
Pg 13: No difference between standard and gamified formats.	100.0%	100.0%	0.0%
Pg 9: Explicit time limit added to open-ended question (30 seconds to name the most restaurants).	96.9%	96.3%	0.6%
Pg 7: Grid question reformatted using symbols rather than text ("Excellent" converted to 5-star icon).	93.9%	92.9%	1.0%
Pg 8: Single-select question enhanced with personalization ("If I could go to any city to eat dinner tonight, would you recommend Birmingham?").	100.0%**	96.5%	3.5%
Pg 4: Projection technique added to open-ended question ("Foodie TV has announced a competition...what can your city do to win?").	95.3%**	85.9%	9.4%
Pg 6: Explicit time limit with rules added to open-ended question (15 seconds to name exactly 5 adjectives)	91.9%**	72.9%	19.0%

** denotes statistically significant difference between proportion completing standard and gamified surveys at the $p < 0.05$ level

The gamified version (with different fonts and colors)...

"On the next few screens, you'll see a description of a city. Is it…Birmingham? Atlanta? Jackson? Chattanooga? Charlotte? Montgomery? Mobile? Nashville? SPEED COUNTS! What cities do the following descriptions sound like?"

...had a higher completion rate than the standard version:

"Below are several features. For each feature, what city do you feel best fits the description?"

The gamified version...

"Wanna find out what your restaurant preferences say about you? We'll show you several features of a city's restaurants. Tell us how important each feature is to you and we'll tell you what kind of person you are."

...had a higher completion rate than the standard version:

"Below is a list of features of a city. For each feature, please indicate how important it is to you for a city to have this feature."

Not a panacea

The conclusion? There may be merit in using gamification techniques to curb the continuing decline in completion rates but it is not a panacea. Some techniques seem to have a negative impact on completion rates – explicit time limits and rules, for instance. However, other techniques show promise – feedback mechanisms, in particular. In whatever way the challenge of engaging reluctant respondents is addressed, the problem is one that deserves our attention and creative solutions.

Susanna Warnock is assistant professor of business, Piedmont College, Walker School of Business, Demorest, Ga. She can be reached at swarnock@piedmont.edu. J. Sumner Gantz is an MBA student, Piedmont College, Walker School of Business. He can be reached at jgantz0422@lions.piedmont.edu.

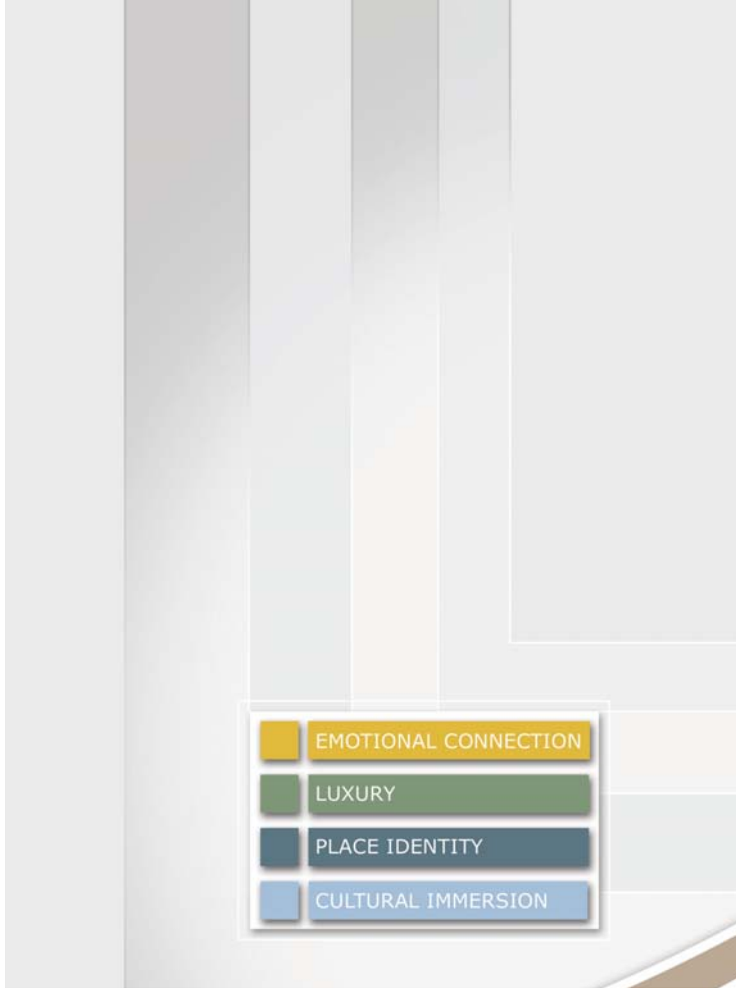
case study

customer experience research

A strong sense of place

How research helps Fairmont Hotels & Resorts understand guests' emotional needs and motivations.

| By Mike Taylor



snapshot

Fairmont Hotels & Resorts uses a range of research methods, including mobile ethnography, to develop its Luxury Insights reports and stay in touch with the trends driving luxury travel.

quirks.com/articles/2016/20161007.aspx

The ability to identify a market trend, particularly during the formative stages, is a unique art. Indeed, trend forecasting requires a degree of instinct, creativity and anticipation remindful of an artist. Identifying the consumer motivations and emotions that drive those trends, however, is a science.

Fairmont Hotels & Resorts, a global hotel company that operates more than 70 hotels worldwide, including landmarks like The Savoy in London and The Plaza in New York City, noticed significant shifts in consumer demand and guest perceptions of what constitutes a luxurious travel experience. For today's affluent travelers, the company found, emotional fulfillment, experience over commodity, cultural immersion and historical connection all play significant roles in the decision-making process.

In 2015, 38,000 self-described "history lovers" stayed at more than one of Fairmont's historic properties. In anecdotal research, guests of Fairmont were increasingly remarking on their sense of connection with the location, history and "sense of place" of the hotels in which they were staying. Fairmont concurrently observed an undeniable increase in the prevalence of guests sharing their experiences at Fairmont properties, particularly through the use of social media while on-site at the hotels.

To explore the motivations behind these and future global trends in luxury travel, Fairmont developed its Luxury Insights report series – communication pieces that leverage a combination of sourced external research, newly commissioned research and industry-validated findings.

For its inaugural Luxury Insights report, Stewardship of Iconic and Historic Buildings, Fairmont drew on findings from a brand-first ethnographic study conducted by research firm Weinman Schnee Morais Inc., data from researcher YouGov and other sources.

The icons of tomorrow

As a leader in the restoration and stewardship of historic properties, along with the development of new hotels designed to become the icons of tomorrow, Fairmont has a vested interest in the role of architecture, property development and thoughtful preservation and restoration as emotional drivers that influence consumers' purchasing decisions.

Stewardship of Iconic and Historic Buildings focuses on the exploration and understanding of consumer motivations in selecting historical or classical properties for leisure travel. The findings on this subject are useful not only to Fairmont but to the wider community – for example, interested travelers, developers looking for a brand to manage a building or city leaders wanting to understand the significance of properties within their jurisdictions.

The report draws from external research on current travel trends and extensive feedback from Fairmont guests worldwide. The guest feedback was generated using a combination of insights gathered from 6,559 Fairmont guests in 2015 and 12,736 Fairmont guests in 2014, as well as an in-depth, ethnographic research study comprised of a smaller group of guests in 2015.

The larger group of survey respondents consisted of guests who have been patrons at Fairmont properties, including Fairmont Le Château Frontenac, Shanghai's Fairmont Peace Hotel, Fairmont Baku, The Savoy and The Plaza. Guests who participated in the ethnographic research study were frequent guests of multiple Fairmont properties.

Fairmont's ethnographic research leveraged purposeful sampling, a common practice among this type of study and an approach supported by evaluation consultant and sociologist Michael Quinn Patton, author of *Qualitative Research & Evaluation Methods*. Six mobile ethnographies (communicating on-site and via telephone) allowed respondents to be "in the moment" and expressive of their emotional reactions during stays at the Fairmont Palliser, Fairmont Le Château Frontenac, Fairmont Royal York, Fairmont Hotel Vancouver and The Plaza. Two off-site telephone interviews were also conducted, while two in-person micro-ethnographies took place at The Plaza.

Key themes emerged

From this research, a few key themes emerged that highlighted both Fairmont's legacy of stewardship and the appeal of vacationing in a historic destination or property. These themes formed the basis of the first volume of the Luxury Insights Report.

Emotional connection to a travel destination. Fairmont's research indicates the vital importance of emotional fulfillment when it comes to the choice of travel accommodations. The desire for emotional connection at the traveler's destination acts as fuel for the other trends mentioned within the Luxury Insights Report: the new definition of luxury; the drive to seek place identity and the motivation for cultural immersion.

Through its research, Fairmont has defined the overall character of its guests as Social Architects – travelers who seek luxury through relationships rather than objects and believe that "experience defines excellence." A separate study indicated that more than 75 percent of five-star travelers feel that "capturing the local culture of the destination" and "having a beautiful hotel" are extremely/very important for leisure trips.

Extrapolating from the data, one might conclude that the desire for emotional connection is a natural outcome in the evolution of global travel. Logical, prescriptive, often defensive travel tactics have been replaced with adventurous pursuits, personal concierges and iPhones. Today's intrepid travelers follow their hearts and are impressed by experiences that appeal to their imaginations and desires. This is particularly true among an affluent population with a high prevalence of travel for both business and leisure.

Redefining luxury. A clear finding from the research behind the Luxury Insights Report is that, among luxury travelers, the very definition of luxury has evolved. An overwhelming trend demonstrates that affluent travelers align social status with the consumption of unique experiences rather than material goods – the idea of experience over commodity. This growing tendency to value rare, covetable experiences over mere material comforts means that the entire notion of luxury itself among these guests has been redefined; transforming "luxurious" travel from the passive position of simply being pampered to the active participation of creating unforgettable memories.

Whether it is through food, fashion, arts or sports, today's travelers choose to immerse themselves in the culture of their destination. They are active participants in travel rather than latent observers.

Not content to be simply doted on, the luxury guest now views personalized rapport and genuine attention from staff as intrinsic to the luxury experience. The long-lasting impressions made by Fairmont colleagues are cited as a significant reason why guests enjoyed their stay and a major incentive to return.

Certainly, the allure of high thread-count sheets, white marble vanities and elegant lobby lounges will persist among luxury travelers. What has changed however, is the emphasis: high-quality material comforts are now a baseline expectation among affluent travelers. The surprise element of an emotional, intangible or personal experience provides a more resonant memory, an irreplaceable moment in time that is more meaningful and remarkably valuable.

Seeking place identity. Place identity, or the psychological connection to a destination, has become a market differentiator and the key to establishing an emotional connection. Hotels with rich histories enable guests to feel like they are personally connecting to the past and bearing witness to something meaningful, important and enduring. Historic and character-rich properties enable guests to psychologically merge with the acclaimed past of the hotel to the point that travelers actually feel like they are part of the history of the place.

According to the research, many guests feel that Fairmont's historic hotels offer unique and ownable emotional benefits due to their ability to evoke "place identity." Visiting the Venetian Room at Fairmont San Francisco, where Tony Bennett first sang "*I Left My Heart in San Francisco*," can leave an indelible impression. Staying in the suite where Marilyn Monroe once slept at the Fairmont Banff Springs led one guest to remark, "I'm sharing the same space at a different time." Other survey respondents referred to Fairmont's historic or iconic properties as "a magical place," "my dream come true" and providing an experience of "transcending into another era."

Achieving cultural immersion. The opportunity for cultural immersion has become ubiquitous in the decision-making process of luxury travelers worldwide. The research demonstrates that staying at a Fairmont property has provided guests with profound cultural and meaningful life encounters.

A locally authentic hotel can provide a kaleidoscope for the senses. The sights and smells, the food and the service all work together to evoke a unique adventure that cannot be replicated at other properties. This is particularly the case at destinations where Fairmont hotels are seen as intrinsic to the region itself, an important part of the landscape and the local history.

This experience of being at one with a foreign place embodies a new level of prestige among travelers and evidence is typically shared in-the-moment among social media applications. Instagram photos, Facebook posts and tweets on Twitter are examples of the way Fairmont guests commonly and publicly share their delight and excitement over a new experience or a heartfelt moment during their stay.

A visit to a Fairmont property is frequently cited as being on a guest's bucket list – an aspirational experience, where "I stayed at the Fairmont" becomes a validating factor of having immersed oneself in local culture, knowledge and history.

Fairmont's properties and commitment to respectful preservation and restoration of their architecture and interiors are key reasons why guests choose not just the Fairmont brand but each specific hotel within its collection.

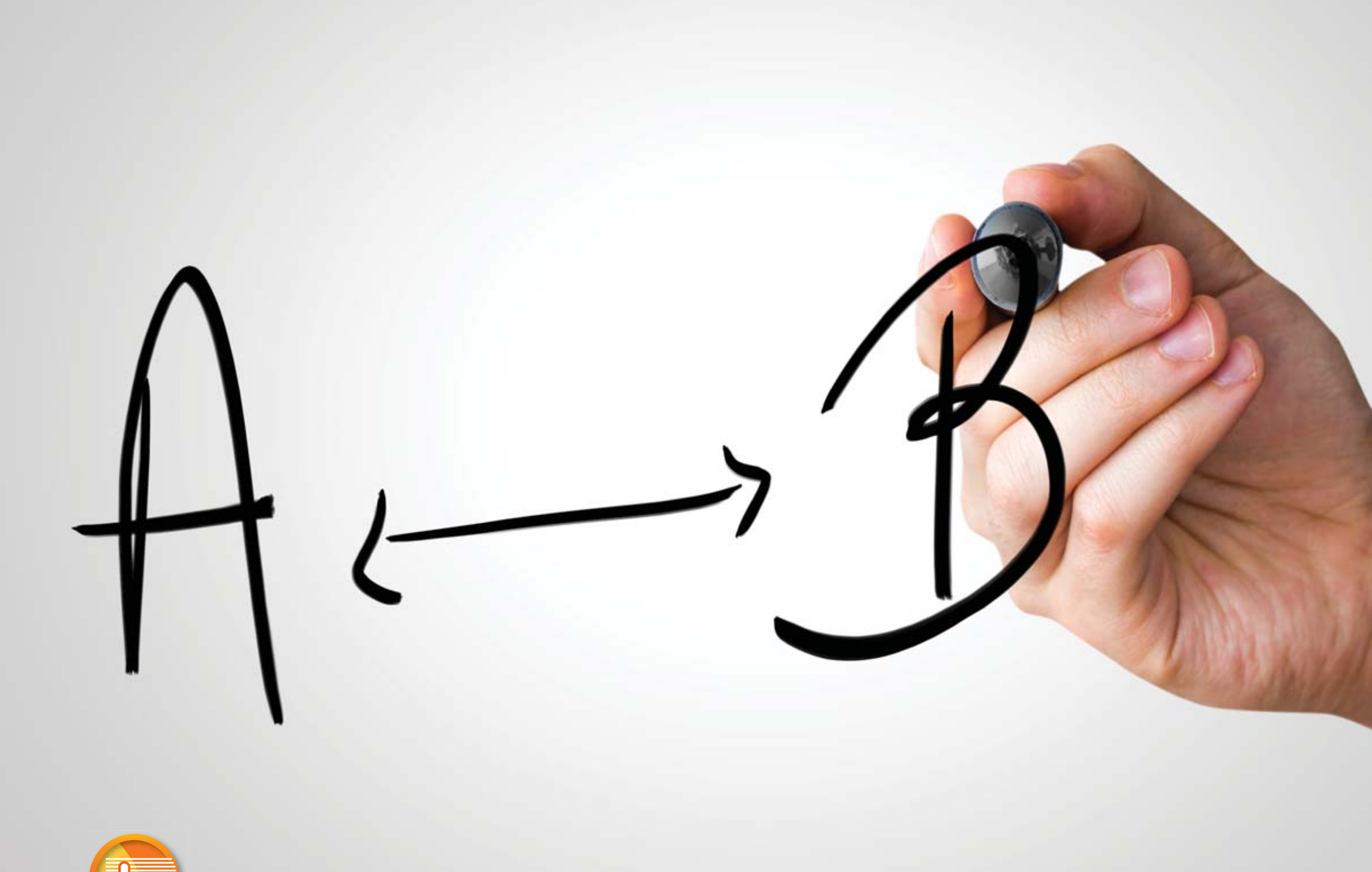
The findings of the first Luxury Insights Report support Fairmont's current scope of restoration activities – many grand buildings worldwide have recently been restored, including the Claremont Club & Spa, Fairmont Le Chateau Frontenac, London's The Savoy and Shanghai's Fairmont Peace Hotel. Working closely with property owners, Fairmont has helped renovate or restore more than 80 percent of its North American portfolio over the last few years.

Research provides a clear mandate

With its guest motivations firmly in mind, Fairmont's research provides a clear mandate to move forward with the development of newer properties that the company believes will define the iconic hotels of tomorrow – properties such as Fairmont Mayakoba, Fairmont Pacific Rim, Fairmont Baku and Fairmont Makkah Clock Royal Tower. Furthermore, Fairmont has more than 40 new developments underway in gateway cities and resort locales across Europe, North America, the Middle East and China.

The choice of a Fairmont hotel, be it historic or newly developed, has been proven to provide the sense of place and personal connection many luxury travelers crave. Fairmont looks forward to developing subsequent issues of the Luxury Insight Report to explore deeper insights around guest expectations and experiences, furthering its commitment as the leading operator of iconic properties worldwide.

Mike Taylor is director, public relations, Fairmont Hotels & Resorts, Toronto. He can be reached at 416-874-2457 or at mike.taylor@fairmont.com.



quirks.com/articles/2016/20161008.aspx

••• health care research

Exploring the 'life as told'

How to use narrative to derive patient journey insights

| By Greg Chu

snapshot

An overview of how the use of a narrative analytic approach can add value in qualitative patient journey research.

We all appreciate a good story. As researchers, however, we sometimes overlook the power of narrative in exploring one of the most basic topics in health care market research – the patient journey. When we rush to impose prefabricated schema on the patient's encounter with illness, we can miss the explanatory arc that emerges from the story that the patient tells about his or her own journey – a story that breathes life into the otherwise dry itemization of events which punctuate the patient experience. "What happens is of little significance compared with the stories we tell ourselves about what happens," wrote the novelist Rabih Alameddine. "Events matter little, only stories of events affect us."

Those who wish to tap into the power of stories can draw from a rich and interdisciplinary body of theory. Sociology, psychology, philosophy and literary criticism have all contributed to the mining

of insights from patient narratives. Unfortunately, much of the academic literature provides little practical guidance for how the market researcher can apply narrative theory or make it relevant in a commercial setting. In this article, we provide an overview of how a narrative analytic approach can be utilized to add value in qualitative patient journey research.

Spans the patient's experience

The backbone of the traditional patient journey is a chronologically-ordered series of events and actions that spans the patient's experience of illness. The scope of the journey may be narrowly defined as beginning with diagnosis and ending with treatment or cure but may expand to encompass the patient's life prior to the onset of illness and project beyond the present to an anticipated future state. Most commonly, understanding of the journey is derived through individual depth interviews, beginning with the patient but often including additional actors, such as health care professionals, caregivers and other providers of support. The events and actions which shape the patient journey also leave their traces in patient charts, prescription fills and insurance claims. Combined with interviews, analysis of such quantitative data can render a reasonable facsimile of the sequence of acts that punctuate and define the patient experience.

Ordering and aligning the events and actions that demarcate the patient experience with illness is essential to understanding the patient journey. But it is not sufficient. Acts reveal only the patient's outer journey, the matter-of-fact flow of events theoretically accessible by observation. Inextricably intertwined with this event-based journey is a second one, an inner patient journey structured around thoughts, feelings and evaluations. The anthropologist Edward Bruner echoes this distinction within a larger context: "A life as lived is what actually happens. A life as experienced consists of images, feelings, sentiments, desires, thoughts and meanings known to the person whose life it is." He then defines narrative as the "life as told," produced by the teller to convey a sense of the life that is both lived and experienced. Exploration of this "life as told" can often reveal deep insights into patient behavior and psychology for it seamlessly integrates the inner and outer patient journeys from a patient-centric perspective.

A nearly universal competency

The good news for practitioners of narrative interviewing is that storytelling is a nearly universal competency. Researchers may generally assume that respondents understand what it means to tell a story. Despite differences in education, subculture or facility with language, interviewer and respondent are likely to share a common concept of what constitutes a story: a teller, a listener, setting, characters, motivation and plot. More often than not, a patient's narrative will self-organize, linking together past events and actions and leading to the present in a more or less coherent fashion. Accordingly, after establishing a degree of rapport and expressing an interest in the patient's experience with illness, it is often sufficient for the interviewer to simply suggest a conventional opening such as "Once upon a time" to get the story started. The interviewer then moves into intent listening mode, providing only non-directive encouragement while the "life as told" unfolds.

In contrast to physicians, who tend to concentrate on the immediate physiological aspects of disease, patients typically view their illness within the context of their past, their future, their relationships with others and their self-identity; in other words, they see their patient journey within the context of their life journey. A breast cancer patient begins her story in an online diary not with her diagnosis but with grade school: "I started swimming in elementary school and have been an instructor for 20 years now. I was participating in the Master's Association for swimming but had to stop because of illness. This year I had planned to get back into training but then got hit with breast cancer." For this patient, breast cancer is not the beginning of her story. It is an interruption in her life story. While patient stories are generally self-organizing and do not require the active intervention of the interviewer, their organizing principles may not be immediately obvious. What may seem at first like aimless narrative digression can become meaningful as the story progresses. The challenge for the interviewer is to resist the urge to prematurely redirect the emerging narrative while attending not only to the narrative content but to its structure as well.

Once the storytelling phase of the interview is complete, the researcher will probe on parts of the story that are not clear and ask the patient to fill in gaps in the story flow. Here the researcher moves from listener to the more familiar role of interviewer. Various stimuli and projective techniques can be profitably employed at this point to bring greater depth to the stories told by patients. One approach is to present the respondent with the possibility of having their story turned into a film. The interviewer can pursue various avenues of inquiry under this premise. What would the film be called? What actor would play the patient, the physician or other key characters identified in the narrative? How would the film end? Names or photos of actors can be provided as additional stimulus. The point is not which actor is selected to play the patient and which the physician. The choices made are useful only to the extent that they lead to a deeper discussion of the patient's self-image, his goals and motivations and interactions with physicians and other stakeholders.

Numerous frameworks

As indicated earlier, narrative theory has evolved under the influence of a diverse range of academic disciplines and within the context of a wide range of applications. It is not surprising then to discover that numerous frameworks have been developed to analyze narratives – even within the relatively segregated area of illness narratives. One frequently-referenced framework with particular utility in patient journey research comes from sociologist Mike Bury, who identifies three narrative forms: the contingent, the moral and the core. These three forms exist to a greater or lesser degree in all patient narratives. Once identified and analyzed together, they provide the essential elements required to make sense of the intertwined helixes of the inner and outer patient journey.

Contingent narrative addresses patient beliefs about the origins of disease, proximate causes for specific illness events and the impact of illness on daily life. It details the actions taken to deal with illness and the mobilization of social and psychological resources to maintain or improve quality of life. Perhaps most importantly, the contingent narrative reveals the patient's causal belief system, which often turns out to be patchwork of biomedical and lay understanding – or misunderstanding – of disease. A man in his late twenties speculates on the origins of his depression and recalls the bullying he suffered at the hands of fellow students in elementary school. "The abuse eventually stopped", he recalls, "but I had already come to the conclusion that I had no talent for anything, and that kind of thinking, once started, can never change." The causal belief system revealed through this contingent narrative helps explain the specific actions taken by this patient, as well as his perception of relapsing depression as inevitable. Such understanding can be invaluable in developing health care communications and patient education programs.

To the extent that illness limits the patient's ability to shoulder responsibilities at home, perform at work or participate fully in other activities, familiar social roles and self-identity are set adrift. If there is stigma attached to the illness or if the sufferer's response to illness is out of step with societal expectations, the patient may also find their sense of self-worth under assault. Within Bury's interpretative framework, how the patient explains, evaluates and integrates these changed relationships and perceptions of self-worth through their story of illness is called moral narrative. A diabetes patient sees his condition as an avoidable consequence of a lack of self-control: "I was diagnosed with early-stage diabetes and honestly, I knew it was going to happen. I always ate and did what I wanted without thought or regrets." In his illness narrative, he acknowledges his fall from grace and commits himself to a more virtuous lifestyle so he can care for his family and see his young son grow up. Another diabetic provides a litany of reasons for her inattention to her illness and poor glycemic control, explaining with some exasperation, "I know it all sounds like just a lot of excuses but they are all true!" In her narrative, she pleads a case for sympathy rather than censure since she is doing all that anyone in her circumstances could be expected to do. The identification and deconstruction of such moral narratives can reveal important insights into the value systems of patients which, in turn, can provide insights into underlying motivators of, and barriers to, specific health behaviors.

Core narrative refers to the literary genre which underpins the patient story. A cancer patient, for example, may cast herself as a hero in the style of romance, confident in her abilities and determined to defeat an implacable and deadly foe. Or she may tell her story in the genre of tragedy, focusing on impending loss, dreams that will never be realized and the suffering of those she may leave behind. The difference in patient perspective revealed through the choice of romantic versus tragic narrative style is obvious. What is less obvious is that the patient's core narrative often draws, either consciously or unconsciously, from a finite, culturally grounded repertoire of archetypal characters, clichés and symbols associated with each genre. Thus, in romance, the patient as hero may see her doctor in the stock role of the wise mentor – think Obi Wan Kenobi of *Star Wars* – who dispenses wisdom as he prepares his young charge for battle. A comic narrative may introduce a sidekick – think Sancho Panza of *Don Quixote* – whose humor and good nature make living with severe illness bearable. Once the iconic roles assigned to stakeholders in the patient's core narrative are revealed, patient expectations of physicians, caregivers, family and friends can be understood at a deeper emotional level. Exploration of stakeholder shortcomings in living up to the demands of these iconic roles can offer guidance for improving patient-physician communication, helping families better care for the patient and making patient directed outreach more effective.

Identify important junctures

Insights from patient journey research help identify important junctures, sometimes referred to as leverage points or pain points, at which patient behavior and experience can be changed for the better. Patient journey research also seeks to understand the barriers and drivers of change at each of these points so as to inform the development of effective behavioral interventions. Identifying leverage and pain points and knowing how to impact them requires a deep understanding of both the outer and inner patient journeys. As described here, a narrative perspective offers an effective and comprehensive qualitative approach to developing a deep understanding of the patient journey in all its behavioral and psychological richness.

Greg Chu is principal at KMK Consulting Inc., a Morristown, N.J., research firm. He can be reached at 973-536-0906 or at greg.chu@kmkconsultinginc.com.

EVENT

ORLD SOLUTIONS.

vent.com

onsor research now®

TICKET PRICES START AT

$75*

Use discount code BigIdeas

*Corporate researcher/end-client only. Other packages available. Price expires 12-16-2016

O LOCATIONS!

BROOKLYN, NY

March 21-22, 2017

●●● health care research

Charting the shift from volume to value

Three marketing research pitfalls to avoid in a value-based care world

| By Emily Gallo

snapshot

Emily Gallo explores the marketing research ramifications of the move to value-based health care.

Today, you can't go anywhere in the health care marketplace without hearing about the shift to value-based care. The insinuation always seems to be that this shift is just around the corner. But in many ways, it is already here. The voluntary nature of participation in value-based reimbursement models is becoming a thing of the past. In April 2016, Centers for Medicare and Medicaid Services (CMS) launched its first of what is expected to be many mandatory bundled payment programs – Comprehensive Care for Joint Replacement (CJR) – and even more recently, announced new mandatory cardio-focused bundled programs slated to launch in July 2017. In the spirit of improving patient outcomes while avoiding unnecessary costs, bundled payment programs like these provide one payment to the hospital to cover the cost of patient care during the acute stay and 90 days after the patient leaves the hospital. Bottom line? Hospitals are now financially on the hook for a successful episode of care and their reimbursement directly ties to how well they satisfy patients.

What does this mean for marketing researchers who are targeting the health care market? The short answer is: a lot. This shift from volume to value is a monumental one, fundamentally changing the way decisions are made and the motivations of the decision makers. Without a firm understanding of this shift, chances are that marketing researchers will have trouble targeting the right audiences with the right customer-centric approaches.

With that in mind, here are three marketing research pitfalls to avoid in the value-based world of today:

Pitfall #1: Not accounting for the fact that decisions are made by cross-functional teams within hospitals

Say goodbye to the days of focusing on just one stakeholder for a product or service. Take the example of launching a new medical device in the field of advanced wound management.

Traditionally, marketing researchers could focus their attention on the key decision maker

quirks.com/articles/2016/20161009.aspx

– the single person or team responsible for making the purchase decision. Previously, for advanced wound management products, you would seek to understand the primary decision maker: the physician who determines wound treatment for patients. You may have also focused on wound, ostomy and continence (WOC) nurses as influencers and more direct users of the product.

But in a value-based care environment, we're seeing a blurring of the lines between clinical, administrative and other roles. For instance, a chief medical officer may focus as much of her time on mapping out economically-sustainable care strategies and driving behavior change in her clinical staff as she does staying abreast of the latest developments in medicine. Given the pressure to identify cost savings while not compromising patient care, administrators are playing a much larger role in purchasing decisions, often informed by broader value analysis committees comprised of cross-functional decision makers and influencers. No longer will the preferences of a few physicians rule the hospital's purchasing behavior.

Marketing research implications: Today's marketing researchers must actively seek insights from a broad array of stakeholders who impact purchasing decisions.

In this example of an advanced wound management medical device, it is now crucial to include physicians, WOC nurses, administrators and patients/caregivers, especially if the product will be used in the acute setting and at home. For products and services that impact work flow, IT stakeholders are crucial to include in your market evaluation and customer research.

Pitfall #2: Failing to uncover the changing definitions of value for each key stakeholder

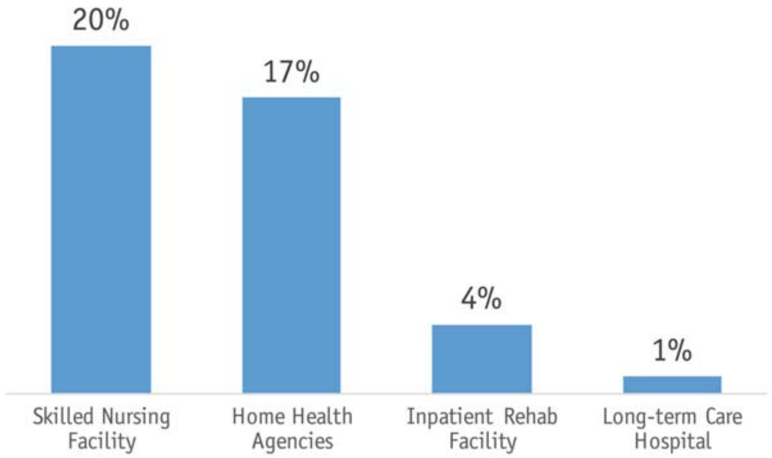
To understand this pitfall, let's consider the top and evolving priorities of hospital CEOs. Financial challenges remained the No. 1 priority in a 2015 survey of hospital CEOs, conducted by the American College of Healthcare Executives.[1] Compared to prior years, the 2015 survey indicated a rise in importance of patient quality and safety (#2), personnel shortages (#4) and patient satisfaction (#5). Failing to acknowledge these changing priorities can lead to two key marketing research mistakes: developing value propositions that address only one of these priorities and approaching all health care providers with the same general message, regardless of their role.

Marketing research implications: Thoroughly investigate the context in which each stakeholder operates and how their definition of value has evolved. Make sure your messaging addresses multiple priorities and that it naturally fits in with the customer's broader strategies for tackling these challenges.

Let's continue with the example of launching a medical device in the field of advanced wound management:

Physicians primarily hold patient safety and outcomes (quality) in highest regard, yet are increasingly taking into account cost and patient satisfaction. It's important to understand their priorities as they relate to your solution. This will also help determine to what degree you should accent the cost savings that can be achieved by switching to your device compared to the incumbent device, while delivering the same high-quality care.

Figure 1: Medicare Beneficiaries In Need of Post-Acute Care Are Discharged to Four Main Settings



Sources: www.cms.gov/Medicare/Medicare-Fee-for-Service-Payment/SNFPPS/Downloads/pac_reform_plan_2006.pdf; www.cms.gov/Medicare/Medicare-Fee-for-Service-Payment/InpatientRehabFacPPS/Criteria.html

Nurses (in this case WOC nurses) give all they have and more to provide the best patient care possible. Especially in this value-based environment, they are increasingly short-staffed and are constantly being asked to do more with less. Probe extensively to understand their evolving pain points and how your product can address them. In this example, you may uncover that there are additional factors that impact a WOC nurse's decision beyond just clinical efficacy of the product. Perhaps they also look for a product that can be used at home – and a product whose intuitive usability will satisfy patients and allow for care continuity. Patient satisfaction then becomes a secondary message and competitive differentiator for that audience.

Administrators have the complex task of ensuring high-quality care while finding substantial ways to take cost out of the system. Now more than ever, they recognize the need for close collaboration with clinicians and are hungry for less-expensive products that can provide their clinicians with the tools they need to be successful. Be sure to understand their strategies for changing physician behavior. For example, who needs to be involved and what business case content is necessary to drive it through a value analysis committee? In this instance, you may find that administrators believe physicians are drawn to economic savings when put in terms of freeing up resources to fund additional staff or beds vs. the standard "save X percent" message.

Patients/caregivers have growing influence on a hospital's ability to succeed in value-based care. Not only are hospitals' reimbursements increasingly influenced by patient satisfaction scores but the market share (patient draw) of the hospital is influenced by social media and other channels through which patients post their level of satisfaction. Patients have a complex health journey to navigate (see Pitfall #3) and the more you understand what hurdles get in their way for achieving positive outcomes, the more you can help your company address those hurdles. In this example, you may uncover that the patient's ability to successfully continue their wound-management therapy at home depends on the ability of the patient and caregiver to properly operate the medical device in the home. This may prompt you to help your company bring to market a smaller, lightweight and easy-to-use version of your hospital medical device that can help support adoption.

Pitfall #3: Failing to see outside the four walls of the hospital

In the past, there have been few financial incentives for hospitals to coordinate care across post-acute care (PAC) settings. Yet, post-acute settings are a key component of a successful episode of care – which creates both challenges and opportunities for hospitals and marketing researchers alike. To understand the significance of this issue, let's take a look at some statistics.

First, the use and impact of PAC utilization is quite sizeable. According to the 2016 Deloitte Health Policy Brief "Medicare Changes in Post-Acute Care Payment," in 2013, nearly half of all Medicare beneficiaries were discharged to a post-acute facility. Those discharged to post-acute facilities went to four main post-acute settings, as pictured in the chart in Figure 1.[2]

That same year, the Institute of Medicine's Committee on Geographic Variation analyzed Medicare post-acute care spending in 2007 through 2009 by PAC sites including skilled nursing facilities (SNFs), home health agencies, hospices, long-term acute care hospitals and in-patient rehab facilities (IRFs). The goal was to determine the extent to which variation in post-acute care spending contributes to variation in total, all-cause Medicare spending. The result? Forty percent of all variation in Medicare spending is explained by variation in the utilization of post-acute care services.[3] To illustrate this point, for the average stroke patient, Medicare may spend $13,344 on home health care services, $33,266 in a SNF or $40,881 in an IRF.[1]

In short, bundled payments and other value-based payment models are accelerating hospitals' need for greater visibility and control over post-acute care.

Marketing research implications: If your product impacts a patient beyond an acute setting, you must gain intimate understanding of the competitive advantages or disadvantages of that impact. If your product does not impact patients in post-acute setting, you may seek to determine if there are next-generation products that can. It will be these types of solutions that edge out the competition moving forward, particularly when they can demonstrate an evidence-based approach to informing or improving the patient's post-acute care path.

Sticking with the example of the advanced wound-management device, it would be critical to understand the utilization of your product outside of the hospital. Is your product so complex that skilled nurses or clinicians are necessary to operate it – requiring a SNF stay for that reason alone? Or is your product designed to support effective use directly by the patient in the home? Historically, a product message focusing on optimizing the post-acute care journey may have fallen to the bottom on the priority list. These days, that competitive differentiator may just be the ticket to gain traction in an established market.

How the relationships are evolving

In today's value-based care world, it's important to use market research techniques that allow you to truly understand not only the evolving priorities of each stakeholder in this quickly changing health care environment but also how the relationships among stakeholders are evolving both within and outside of the hospital. This will help you identify the right key targets and approach them with relevant competitive differentiators based on their priorities.

Emily Gallo is vice president, marketing, enterprise corporate accounts at Cardinal Health, a Dublin, Ohio-based health care services company. She can be reached at emily.gallo@cardinalhealth.com.

REFERENCES

[1] American College of Healthcare Executives 2015 survey of top issues facing hospitals. www.ache.org/pubs/research/ceoissues.cfm

[2] "Medicare Changes in Post-Acute Care Payment." Deloitte Center for Health Solutions and Deloitte Center for Regulatory Strategies, 2016.

[3] Institute of Medicine (2013) Interim Report of the Committee on Geographic Variation in Health Care Spending and Promotion of High-Value Health Care: Preliminary Committee Observations. Retrieved June 3, 2013.

INTERACTIVE VIDEO PRODUCTIONS, LLC

iVP

USA: +1 732.970.9446
UK: +44 (0)20 7487 9290
Info@InteractiveVideo.com
InteractiveVideo.com

MOBILAB™
Usability & Eye Tracking

Usability & Eye Tracking Labs with Technician
Neuromarketing & Biometrics Labs
Ethnographic Videography • Highlights Video
Video Streaming • Remote Usability Research Support

USA

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

BALTIMORE
AIM
Baltimore Research (Towson, MD)

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

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

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

DENVER
Fieldwork Denver
Plaza Research

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

LAS VEGAS
Plaza Research

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

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

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

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

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

NORTH CAROLINA
L&E Research (Charlotte, Raleigh)

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

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

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

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

RHODE ISLAND
Performance Plus (Providence)

SAN DIEGO
Plaza Research
Taylor Research

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

SEATTLE
Fieldwork Seattle (Downtown, Kirkland)
Northwest Insights

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

VIRGINIA
Alan Newman Research (Richmond)

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

WISCONSIN
Focus Pointe Global (Appleton)
JRA (Milwaukee)

UNITED KINGDOM

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

CANADA

Consumer Vision (Toronto)
Research House (Toronto)

FRANCE

ConsuMed Research (Paris)
Passerelles (Paris)

GERMANY

Schmiedl Marktforschung (Berlin, Frankfurt, Munich)

RESEARCH TECHNOLOGY SUPPORT ANYWHERE, ANYTIME

••• customer experience research

Show them the money

Making a business case for CX

| By Valory Myers

snapshot

How CX professionals can learn to speak the language of CFOs and CEOs when seeking funding for CX projects.

Most business leaders today agree that customer experience is a critical competency for competitive advantage and business growth. "Customer relationships" consistently ranks in the top three of the most pressing challenges facing CEOs as reported by the Conference Board's CEO Challenge. Top strategies for addressing this situation include: develop a more outward looking customer-centric culture; enhance quality of products/services; communicate corporate values to customers and key stakeholders; improve alignment and accountability of corporate business practices/management behavior with corporate values; and tailor marketing, promotion and communications campaigns to key customer needs.

All of these strategies require significant investment to implement. What barriers are preventing better execution? In many cases, barriers stem from a lack of understanding the potential ROI of customer experience initiatives. Often, CX professionals are simply not speaking the language of CFOs and CEOs when seeking funding for worthy projects.

A clear business case

To gain executive attention, the CX program needs to have a clear business case. Leadership needs to know specifically how customer experience improvements contribute to financial performance. There are many studies that show the relationship between improved CX and increased sales, expanded market share, superior stock market returns and operational efficiency.

How does CX increase sales? When the customers perceive that a brand provides a significantly better customer experience than their competitors, that brand is chosen by more people, more often and more easily (Figure 1).

More people: Satisfied customers become promoters or brand advocates, sharing their stories of great customer experiences with their friends and family, thus creating new

quirks.com/articles/2016/20161010.aspx

INTELLI SHOP EXPERIENCE IS EVERYTHING.

Mystery Shopping

CUSTOMER EXPERIENCE AND MARKET RESEARCH SERVICES

Mystery shopping is the best way to understand your business from your customers' point of view. Our industry-leading approach can provide the concrete, detailed insights you need to drive improved satisfaction, loyalty, and financial performance.

on location

on your website

on the phone

A custom plan to meet your objectives

Your IntelliShop Client Services Manager will work with you to develop a custom mystery shopping plan, or RoadMap, based on your business objectives. Our unique approach allows you to identify exactly what makes some associates more effective than others so you can hire, train, and incentivize accordingly.

Nearly 1 million highly qualified evaluators

Our pool of nearly 1 million field evaluators is screened to precisely match your customer demographics. Those selected are certified for your particular program requirements and scheduled for the specific locations, times, and activities determined by your custom RoadMap.

Detailed, research-driven responses

Evaluators will interact with your business on location, over the phone, online—or all three, based on your needs, then complete an in-depth questionnaire, developed by market research experts, specifically for your project. Answers are never arbitrary ratings, and include highly detailed, story-like comments so you understand the full customer experience.

Quality, integrity, and advanced analytics

Every evaluation is checked with our 26-step integrity validation process. Results are analyzed, summarized, and provided to your team in real time, through a custom In-Site™ portal that we design to meet your brand, language, and functionality requirements.

A relationship committed to your success

We're founded on an extreme service model and committed to delivering results that help our clients succeed. That's why some of the world's best-known brands trust their mystery shopping to us.

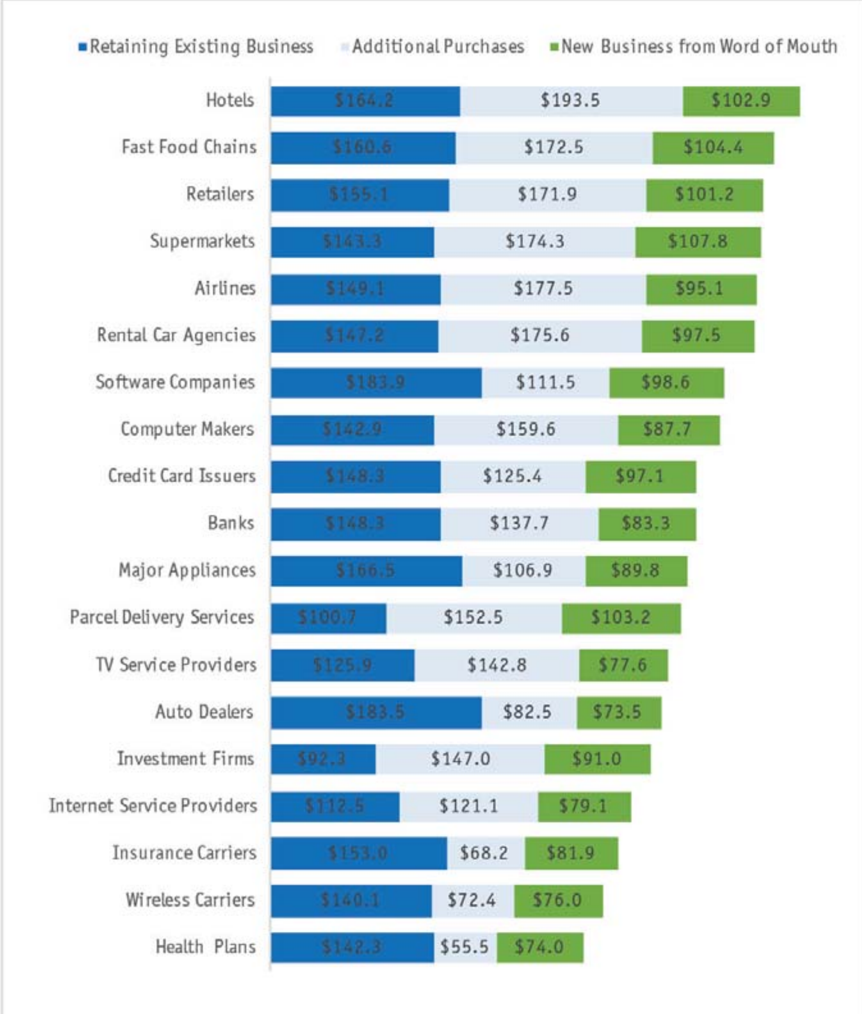
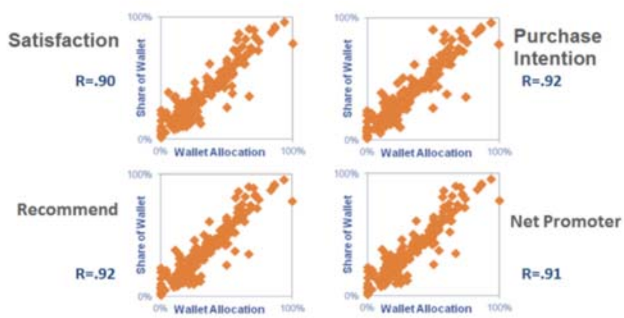


Figure 1: Revenue Increases from Moderate Improvement in CX for Companies with Annual Revenues of $1 Billion (additional revenues over three years [$ million])

Source: Temkin Group Q1 2014 Consumer Benchmark Study (base: 10,000 U.S. consumers).

Figure 2: Correlation of Wallet Allocation Rule CX Metric to Actual Share of Wallet Results



Note: Scatter diagrams show the average share of wallet at the firm/brand level (y-axis) by the predicted average share of wallet using the wallet allocation rule (x-axis). Source: The Wallet Allocation Rule, published by Ipsos.

customers for their favorite brands.

More often: Customers who are more satisfied with their experiences with a brand are more likely to choose that same brand the next time they are making a purchase decision – over other brands they find fall short of delivering a solid customer experience.

More easily: Satisfaction with one product or service also often makes the customer more open to purchasing additional products or services offered by the brand – creating upsell and cross-sell opportunities.

How does CX grow market share? Customers choose to buy from brands

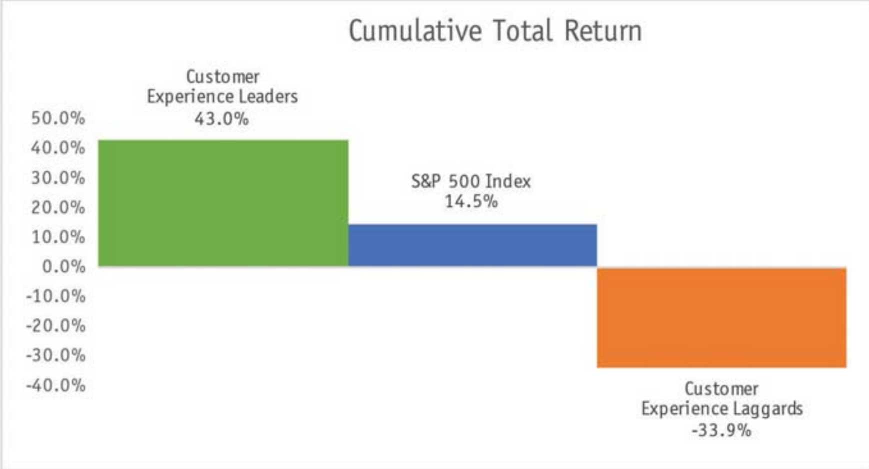


Figure 3: Customer Experience Leaders Outperform the Market 6-Year Stock Performance of Customer Experience Leaders vs. Laggards vs. S&P 500 (2007-2012)

Source: Watermark Consulting, 2013. Watermark defines customer experience leaders and laggards as the top 10-rated public companies in Forrester Research's 2007-2013 Customer Experience Index studies. Comparison is based on performance of equally weighted, annually readjusted stock portfolios of customer experience leaders and laggards relative to the S&P 500 Index.

they prefer over other competitive brands available. People are more likely to choose brands that are salient, form relationships through positive customer experiences meeting functional and emotional needs, rank first relative to competitive alternatives and are accessible (e.g., pricing, distribution). In the era of social media, other people's experiences influence everyone today, not just the customer who experienced it directly. Good and bad experiences impact non-customers as well as other customers. As these choices are made again and again, brands with a good CX reputation are chosen more often. As a result, increasing customer satisfaction relative to competitors drives significantly higher market share.

An Ipsos study of almost 80,000 consumers across 15 countries, 22 industries and more than 650 brands showed a clear linkage in the customer experience metric analyzed in a competitive context called the wallet allocation rule to actual share of wallet (Figure 2). The essential distinction of the wallet allocation rule is that it takes into account both rank – Is your brand a customer's first choice? Second? – and the number of brands in the set the consumer uses. The analysis yielded similar results for a variety of traditional customer experience metrics including overall satisfaction, likelihood to recommend, purchase intent and Net Promoter Score. The relationship between a brand's actual share of wallet and its customers' perception in a competitive context is clear.

How does CX improve stock market returns? Investors prefer brands with positive sales growth and momentum and of course those who are capturing market share from competitors.

Figure 4: Ipsos Loyalty Clients' Stock Market Performance Comparison

	CAGR (5-year)
Ipsos Loyalty Clients	16.8%
S&P 500	10.1%
DJIA	8.0%
NASDAQ	11.8%

Source: Ipsos Loyalty, 2016. Comparison is based on performance of cumulative stock portfolios of the firm's largest U.S. publicly traded clients relative to the S&P 500 Index, Dow Jones Industrial Average and the NASDAQ Index.

Forrester conducts an annual benchmark of Customer Experience Index (CX Index) rankings which include how effectively consumers felt their needs were met and how they assessed the ease and enjoyability of their experiences with a wide variety of brands across several industry sectors. A macro-analysis of these CX Index scores collected by Forrester (Figure 3) validated that companies with a higher CX Index rating among their customers greatly outperformed the S&P 500 by a margin of 3:1!

Ipsos Loyalty created a stock market "portfolio" of our current Ipsos Loyalty clients – selecting our largest, most-tenured and -engaged clients and of course, publicly traded (n=17). The index is based on the cumulative percentage change in the market value updated monthly over the past 10 years.

When our clients leverage customer insights and management tools, their stock market performance exceeds the general market. Looking at the compound annual growth rate (CAGR) on a five-year basis alone, the returns for Ipsos Loyalty clients are significantly higher than the S&P 500 and NASDAQ, by at least five percentage points, and more than two times higher than the DJIA! By responding to customers' needs more effectively than competitors, our clients recover from downturns and capture value during growth periods much faster than the broader market.

How does CX drive operational efficiency? When a company focuses on CX, it integrates feedback through multiple customer listening posts in an insights hub for the organization, typically an enterprise feedback management (EFM) system. An EFM system allows real-time access to customer feedback following key interactions (e.g., product purchase, customer service call). When done right, companies can use that real-time feedback to improve service recovery with more effective closed-loop processes that lower the cost of service. By proactively following up with dissatisfied customers, brands can eliminate return trips to the store or calls into the phone center and, even worse, defection! Brands that are world-class at closing the loop take it one step further and establish operational processes to identify critical incidents in real-time, route to the right person and resolve with the appropriate intervention. Algorithms based on a combination of factors, such as type of critical incident, customer profile/value or transaction history, can then be created to help companies deploy intelligent closed-loop systems that can suggest the most appropriate response in any given situation. Ipsos has published a separate whitepaper based on primary research which demonstrates the financial value of this system: www.ipsos.com/sites/default/files/2016-07/smarter_closed_loop.pdf.

Other benefits of a CX-focused culture that best-in-class brands enjoy is often a lower cost of acquisition and better-than-average customer value. They achieve this by targeting the right customers with the right messages that resonate and the best product/service/value mix for their needs. The right customer, message and offer are usually uncovered through a loyalty key driver analysis in VOC measurement programs and by profiling most/least loyal customers to identify which prospects are most likely to benefit from their product or service. Through improved targeting, brands can attract new customers and deepen relationships with existing customers with less effort.

Finally, best-in-class CX leaders are relentless in prioritizing which areas of the customer experience they want to be known for (e.g., low cost for Southwest Airlines) and which areas they do NOT (Southwest is not selling luxury). Brands cannot be all things to all customers. Often, brands are over-delivering in areas that don't really matter to their customers and don't contribute in a meaningful way to the customer's experience. By reducing investment in those low-impact areas, brands can save money, freeing up dollars for those relevant CX improvement initiatives on the list.

Speak the right language

To help CEOs address the pressing "customer relationships" challenges, CX professionals must learn to speak the right language of ROI to secure funding for projects that will improve the customer experience. The evidence is clear and compelling that improving customer experience has a positive financial impact to businesses in many ways. CX leaders should build the business case for a CX improvement initiative to compete – and win – on a level playing field with other projects CEOs are reviewing. Best practices include utilizing an ROI calculator to estimate an initiative's impact on customer loyalty and ultimately the financial impact expected – through sales growth, market share, cost savings, etc. Once funded, best-in-class companies track CX improvements over time and calculate the actual financial impact. With these real-world ROI results, CX professionals gain the credibility to seek investment for larger improvements, leveraging the same business case discipline. Customer experience improvement initiatives are worthy investments and sound business cases are needed to secure CEO buy-in.

Valory Myers is a former vice president at Ipsos Loyalty, a division of France-based research firm Ipsos focused on customer and employee relationship management.

••• customer experience research

The getting of wisdom

Why maturity matters for customer experience management

| By Michael Allenson

snapshot

A global study of CX professionals provides a road map for developing customer-centric internal processes.

Though customer experience (CX) management practices such as measuring a Net Promoter Score, creating hot alerts, customer journey-mapping and many others have become standard procedures in many businesses over the last 20 years, most have not produced the success that companies want. In 2015, research by the Temkin Group found that less than one-third of companies rate their CX efforts as "good" or "very good" at "making changes to the business based on insights." [1]

A new study by MaritzCX explains why so many very capable CX professionals are struggling and identifies a formula for success that a small number of companies have used to achieve outsized business success.

Beginning in 2015, this large global study of nearly 5,000 companies was used to develop a CX maturity framework known as the CXEvolution, with the goal of helping CX professionals in a wide range of industries chart a course to greater success at driving business outcomes with an improved approach to customer experience. Participants answer questions about how CX fits within their organization and impacts business outcomes. The results serve as a benchmark to help companies assess their CX maturity level and compare themselves against others in their industry and to CX leaders across industries. The study also sheds light on the state of CX and has helped to uncover core truths and best practices.

Key findings include:

CX programs are an operational priority in a majority of the companies surveyed, yet making CX a priority does not necessarily reap business results. According to the study, 56 percent of the companies surveyed have a formal CX program, with airlines, consumer packaged goods, breweries, apparel and supermarkets leading the pack. Yet, only 28 percent of CX professionals reported their CX programs to be "very successful."

More data does not necessarily lead to program effectiveness. The CX Evolution study suggests that too many organizations think they can improve CX simply by adding more listening posts and collecting more data. While this provides more feedback, in

quirks.com/articles/2016/20161011.aspx

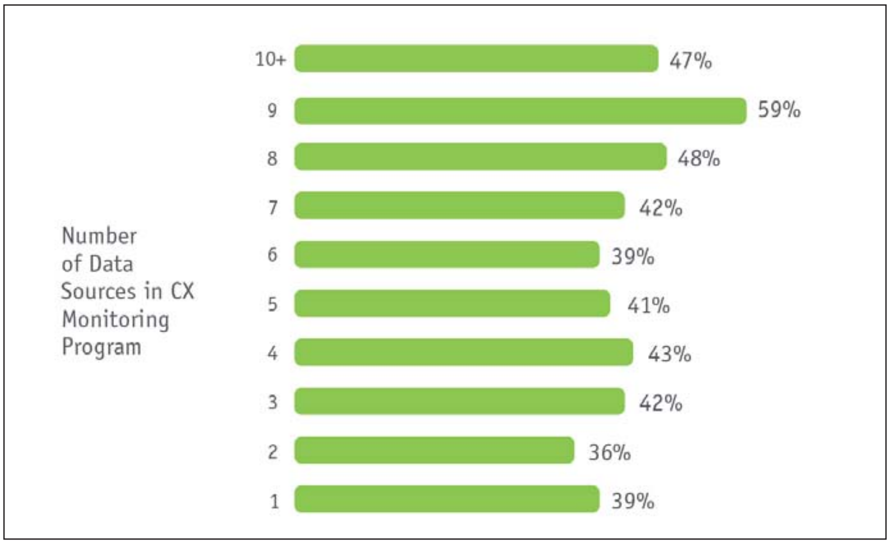


Figure 1: Number of data sources does not increase program effectiveness. Source: MaritzCX global study 2015.

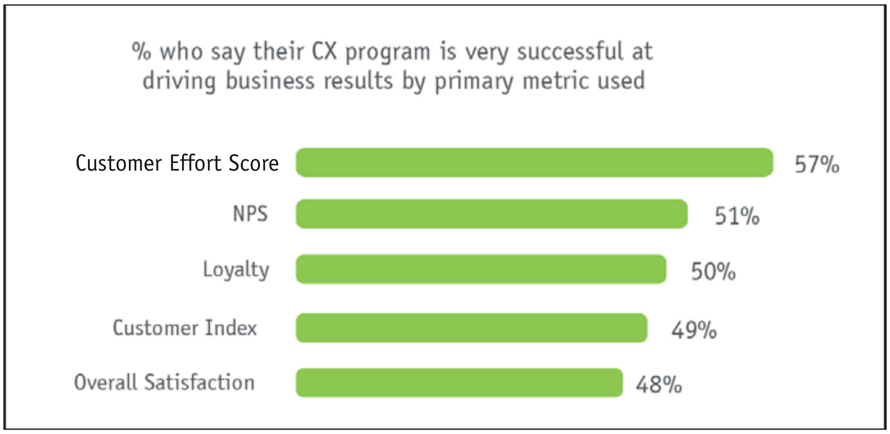


Figure 2: The metric decision is largely inconsequential. Source: MaritzCX global study 2015.

Figure 3: Percentage of organizations more concerned with score than customer experience. Source: MaritzCX global study 2015.

and of itself, more feedback doesn't help organizations achieve successful business outcomes.

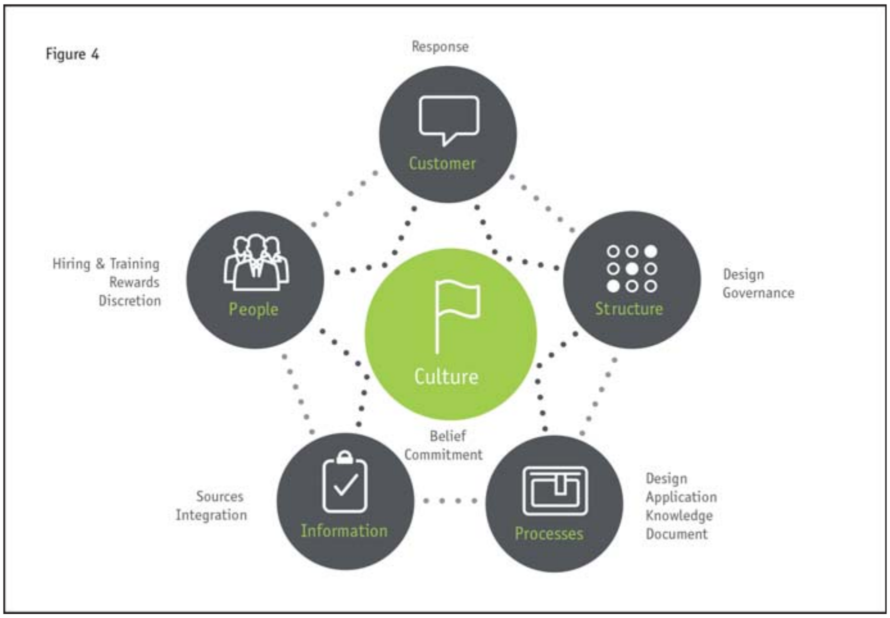
In the early days of CX, organizations were focused on measurement to get feedback at the individual contributor level to drive performance improvement. Over time, more listening posts were added to expand the ability to get feedback from many different channels, such as Web sites, customer service call centers and help desks. CX programs then began to include relationship studies and customer loyalty metrics. Some organizations even attempted to link CX activities to business results. However, as Figure 1 shows, according to the participants in the CXEvolution study, more measurement in and of itself does not equal more direct impact on business results.

The choice of the primary metric used to measure CX success is largely inconsequential. Since NPS was introduced in 2003, we have heard that it is "the one number you need to know." NPS has been promoted as a simple, elegant way to measure customer loyalty in a way that can be correlated with business outcomes. Since that time, numerous competing metrics have been introduced by industry consultants, all of which have been validated based on their correlation with business outcomes.[2] This alphabet soup of CX metrics has led to much debate over which metric to use in a CX program to measure loyalty and drive business results.

The truth of the matter is: It doesn't matter. As the chart in Figure 2 shows, the choice of metric – such as NPS, Customer Effort Score, overall satisfaction, etc. – has little to no impact on whether the CX program is successful at driving business outcomes. If anything, one could argue that Customer Effort Score is slightly better. However, the results suggest that organizations that choose that metric are inherently more customer-centric to begin with.

Additionally, focusing on metrics can be counterproductive, especially if teams are rewarded for reaching a specific target score on the chosen metric. The emphasis on score-chasing often leads to unwanted behaviors such as giving away merchandise or outright asking for a score. The end result: Employees believe their companies are more interested in the score than on really improving the customer experience (Figure 3)!

A successful formula for CX entails maximizing customer-centricity across 14 specific core competencies that comprise six organizational dimensions of CX (Figure 4), all of which have a direct impact on CX performance and business success. MaritzCX validation research shows that the 14 competencies distinguish between the companies that simply want to drive business outcomes with CX and those that actually do. The study found that companies that excel in CX, such as Amazon and USAA, have actually made huge investments



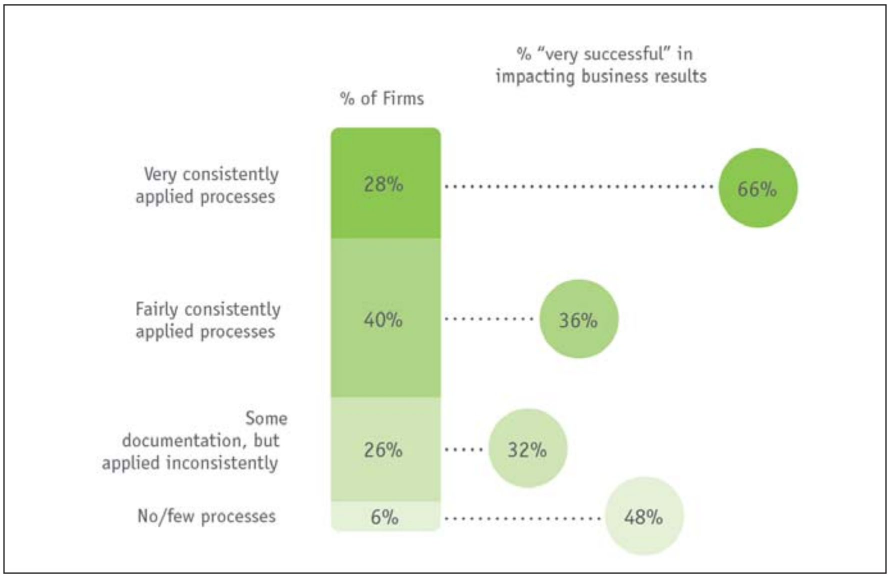


Figure 5: Program success happens only when processes are applied very consistently. Source: MaritzCX global study 2015.

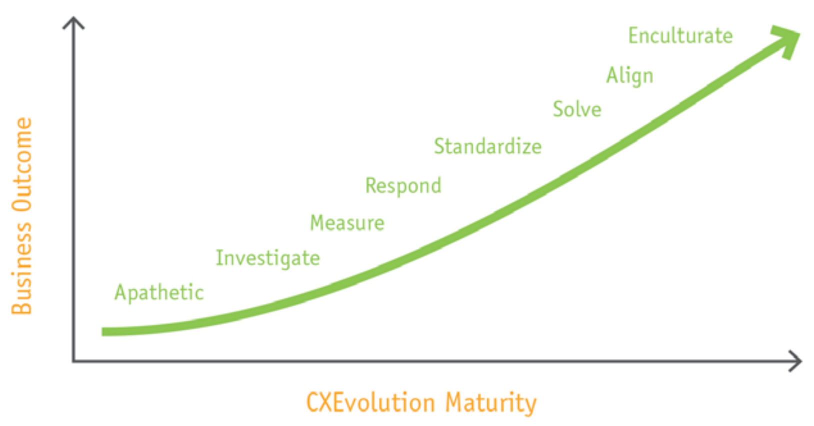
in 14 customer-impacting competencies, ranging from operational process documentation to employee hiring and training programs.

For example, when it comes to process documentation – one of the 14 core competencies – only 25 percent of the study respondents say that their companies document customer-related processes very consistently. However, two-thirds of those folks who report very consistent documentation say that their CX programs have been very successful at impacting business results (Figure 5). The data also suggests that doing something half way may, in some cases, be worse than doing little or nothing at all.

Companies can be evaluated along a developmental or maturity scale based on specific things they do relative to the implementation of CX programs. Findings from the CXEvolution study and the validation against business results have resulted in a framework that can be used to assess an organization's current level of CX maturity. This framework allows companies to understand the maturity of their CX efforts and determine how they compare with others in the industry as well as those at a similar stage of CX maturity across all industries.

The framework and underlying competencies give companies a foundation upon which to develop a prescriptive road map for how they can evolve and advance. This is an important step, as the CXEvolution study found that even incremental gains in CX maturity yield

Figure 6



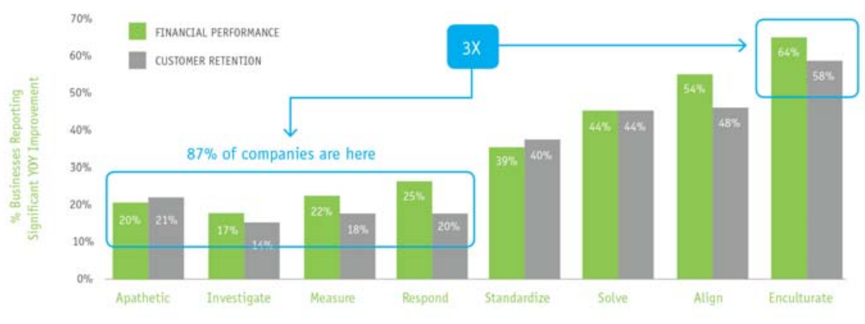


Figure 7: Companies that are at the highest levels of maturity are 3 times more likely to have improved financial results and retention as compared to those in the lower half of the maturity curve.

significant results (Figure 6).

High maturity in core competencies is strongly linked with business outcomes. CX leaders are three times as likely to have experienced significant improvement in retention and year-over-year financial outcomes as their counterparts that have not invested in these competencies. As seen in Figure 7, companies that are at the highest level of maturity are three times more likely to have improved financial results and retention as compared to those in the lower half of the maturity curve.

For those organizations at the bottom four stages – which account for 87 percent of companies in our benchmark study – one or more of the 14 CX competencies may be holding them back. The research explains why some companies that have invested heavily in CX may not be seeing the results they hoped for. A company's CX maturity level is determined by its weakest link among the 14 CX competencies.

Move to the next stage

The study also found that most CX pros probably think they know how their organization is doing in terms of CX maturity but they may not know what specific competencies are holding them back – and what specific actions they can take to realize better business outcomes. The guide below describes each stage of the maturity curve and provides a general idea of what defines companies that are in each stage as well as what it takes to move to the next stage.

Companies at the **apathetic** stage have no listening posts, few customer processes and a CX organizational structure that is basic and not well-defined. Customer focus is subordinate to other business imperatives like profit generation or supply-chain efficiency. These organizations may be delivering a good customer experience but it's not an area of deliberate focus.

Key to moving up: Take the time to understand what you're missing by not focusing on CX.

Companies at the **investigate** stage have created some customer-focused processes but typically don't apply these processes consistently across the organization. Information collection is ad hoc or anecdotal and customer focus is sporadic. In most cases, this inconsistent approach to CX is worse than doing nothing at all. By only dipping their proverbial toes in the water, these organizations often set customer expectations they can't meet.

Key to moving up: Institutionalize successful "guerilla" CX tactics and ensure consistent application.

At the **measure** stage, the organization's CX knowledge and application are still inconsistent but customer processes are clear and documented and the organization has begun to see financial results. There is likely centralized oversight in frontline decision-making but no guiding customer strategy. Functional groups are often at odds and executive support can be lackluster, causing the fervor of a few to fizzle out.

Key to moving up: Deploy a transactional measurement program with ongoing metrics.

Companies in the **respond** stage have well-documented processes and a strong focus on service recovery. Case management systems greatly mitigate negative word-of-mouth but they are typically not connected to more integrated CX systems. Management support and customer metrics in employee performance goals are on the rise but autonomy on the front line is still lacking.

Key to moving up: Empower employees with integrated customer data and build customer metrics into performance evaluations.

The **standardize** phase is the phase at which most organizations peak. Processes are standardized and formative data integration leads to customer metrics and incentives for meeting them. Frontline employees have some discretion to resolve customer issues and behavioral standards are put in place. A chief customer officer may be named but the position often carries limited power and influence.

Key to moving up: Extend focus on resolving individual customer problems to resolving larger, more systemic issues.

Organizations in the **solve** stage are focused on understanding and resolving root causes. Employees are hired based on their customer skills in addition to traditional qualifications. Customer data from multiple sources is integrated and processes are designed to balance customer focus with efficiency. The pursuit of a CX "score" gives way to a more holistic approach that links behavioral metrics, outcomes and incentives.

Key to moving up: Centralize customer experience in a single governing body and empower them with integrated data and predictive analytics.

For organizations in the **align** stage, customer experience becomes a centralized function that touches all parts of the organization. Rather than tying incentives to scores, customer focus is universally understood to be good business. This "customer-first" focus permeates process design and all employees understand their role in enabling it. Data is consolidated and disseminated to anticipate and prevent problems before they occur.

Key to moving up: Focus on hiring employees who have an innate understanding of CX and leverage technology not only to prevent tomorrow's problems but to spark tomorrow's innovations.

At the **enculturate** stage – the pinnacle of CX maturity – customer focus is ingrained in the very fabric of the organization and customer data drives organizational decision-making and innovation. Technology is used to connect customer metrics and anticipate what will delight customers. Customers are often involved in measuring the organization's progress and the need for a centralized function to oversee customer efforts diminishes.

Key to moving up: The enculturate stage is a journey and not a destination. To keep growing and improving, these organizations should focus on CX innovation and make sure their organizations are flexible enough to adapt to an ever-changing world.

Develop a more holistic approach

Organizations that want to be effective in their CX efforts must move beyond a measurement-driven approach and pass through distinct stages of development. As part of this evolving process, they develop a more holistic approach to CX, one that weaves CX into the very fabric of their company.

Findings from the MaritzCX global CXEvolution study indicate that organizations should realize that their CX will not change through implementing measurement and technology programs alone. Rather, they should take time to look themselves in the mirror, understand which operational competencies are most critical to their customer strategy and invest intelligently.

More than ever, CX is a strategic priority for companies. CX improvement is the result of targeted organizational change in certain core competency areas. To get the right customer experience, companies must take steps to mature their CX programs and efforts. All else will follow.

Michael Allenson is senior strategic consulting director in the Chicago office of MaritzCX. He can be reached at 773-932-2866 or at michael.allenson@maritzcx.com.

REFERENCES

[1] Temkin Group State of the Voice of the Customer Programs, 2015 www.prnewswire.com/news-releases/voice-of-the-customer-programs-are-successful-but-not-yet-mature-according-to-new-temkin-group-research-300166622.html

[2] http://excafe.maritzcx.co/time-for-a-more-strategic-approach-to-cx-management/

special advertising section

Experts in Full Service Research

When it comes to conducting a research project, there are many different things you need to consider. You may be asking yourself: What techniques and methodologies will work best to achieve my research goals? How can I get the most out of my insights? Arguably the most difficult task is trying to find a research company that can help you with all aspects of your project. That's where full-service research firms come in.

Full-service market research firms can offer many different tools, techniques and resources to help you accomplish all of your research needs. From start to finish, full-service firms offer customized solutions for your project and help you carry out all aspects of your research to ensure you receive the most relevant and useful insights. Whether it's qualitative or quantitative, in-person or online research, full-service firms offer many different techniques and methods to help you determine what works best for your research project. Many full-service firms also have the ability to conduct research on a wide variety of industries, from health care to food and beverage, entertainment to financial services. So if you need a research firm that can do it all, check out these companies that offer full-service research.

quirks.com/articles/2016/20160833.aspx

3Q Global

Founded 2006 | 25 employees
Traci Wood, Director of Sales

Backed by 50+ years of experience, staff and data collection expertise, powered by Quick Test/ Heakin and Discovery Research Group, 3Q GLOBAL is a trusted full-service research firm, offering

creative and customized solutions for all of your market research needs. Our experience includes study design, project management, data collection, coding, programming, text analytics and executive summary reporting. Our data collection methodologies include field work; mall/hall interviewing; CATI/CAWI; IVR; online surveys; in-person and online focus groups; market research communities; and bulletin boards. Regardless of how big or how small your research projects are, 3Q GLOBAL is “The Connection to All of Your Market Research Needs.”

Phone 855-799-0003, ext. 6114
www.3q-global.com

B2B International

Founded 1998 | 120 employees
Matthew Harrison, CEO

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

Phone 914-761-1909
www.b2binternational.com

Beta Research Corporation

Founded 1970 | 25 employees
Amy Gorelkin, CEO

Beta Research is a family-owned, full-service provider of custom research that helps organizations make smarter strategic choices. Our experienced employees use a range of methodologies – quantitative and qualitative, traditional and cutting-edge – to obtain information our clients need when making key decisions. Beta Research is a certified woman-owned business with a demonstrated commitment to sustainability and social responsibility. We conduct consumer and business-to-business research, with special expertise in health care/pharmaceutical, media and consumer products. Beta Research continues to innovate in the marketplace, recently launching its new mobile geofencing and iBeacon technology and opening a state-of-the-art focus group and usability testing facility.

Phone 516-935-3800
www.betaresearch.com

Marketing & Sensory Research for the Product Pipeline

Blueberry Marketing and Sensory Research

Founded 2001 | 30 employees
David Reckner, CEO

Blueberry builds a bridge between marketing and research. Combining expertise in marketing research, product testing and sensory science, we help guide innovation pipeline projects from the early concept phase through commercialization. We work with you to explore customer insights, understand your market, guide your strategy, develop superior products and services and create engaging customer experiences with your brands. Blueberry offers a complete portfolio of traditional, breakthrough and proprietary solutions serving a range of Fortune 500 clients from manufacturers of food and beverage, home care and personal care products to financial services institutions. Let's talk about your innovation landscape.

Phone 267-954-0440
www.blue-berry.com

Chudnoff Associates

Founded 1989 | 10 employees
Mark Chudnoff, CEO

Chudnoff Associates Inc. has been providing custom marketing research solutions for almost 30 years. Servicing a wide variety of industries including food and food service, financial services, consumer goods, health service and business-to-business. Our award-winning partnership demonstrates a strategic point of difference in the areas of quality, service, innovation and value. Our signature FasTrack Sensory Optimization Program offers a platform to develop award-winning products. With our new portable tablet lab and our own reliable Wi-Fi connectivity, interviewing can be completed virtually anywhere. Our professional certified researchers will guide any client through their individually-designed project from beginning to end.

Phone 732-863-1100
www.chudnoff.com

Clear Seas Research

Founded 2006 | 15 employees
Mitch Henderson, Co-CEO

Clear Seas Research is a full-service marketing research company focused on conducting business-to-business market research for niche markets including construction, food and beverage, manufacturing, packaging, HVAC and security. Unrivaled sample reach into these core markets is provided by myCLEARopinion panel. Subscription-based, syndicated industry offerings from CLEARMarketTrends Reports and CLEAReports provide clients with valuable insights into these niche markets. While core custom research solutions focus on understanding brand positioning, marketing effectiveness, customer satisfaction/experiences and new product development, customized research methodologies are developed for every project. Data collection methods include online surveys, focus groups, central location testing and mail surveys.

Phone 248-786-1683
www.clearseasresearch.com

CSS/datatelligence

Founded 1989 | 110 employees
Mary Cunningham, CEO

CSS/datatelligence offers extensive capabilities across most methodologies, unequaled savings and the benefit of working with one supplier for your business initiatives. With 20+ facilities in the United States and 400,000+ members in our online panel, we have remarkable access to the American consumer. Our U.S. capabilities, combined with long-standing international partnerships, gives us a worldwide reach, allowing us to conduct projects globally in a wide range of categories including fragrance, health and beauty aids, food and beverage and more.

Phone 866-209-2553
www.cssdatatelligence.com

Customer Lifecycle LLC

Founded 2008 | 15 employees
Karin A Ferenz, CEO

In today's challenging marketplace, we at Customer Lifecycle help organizations do more with less. We are a global research consultancy working with B2B/B2C companies to plan and conduct research to accurately identify and measure requirements for customer acquisition, satisfaction and loyalty, share of wallet growth and retention. With reach to about three million individuals in 160+ countries, we conduct strategic qualitative and quantitative research in multiple localized languages on a worldwide basis, specializing in advanced analytic techniques. We help companies avoid costly mistakes by focusing on thorough front-end planning, appropriate support for research execution and action implementation at the back end.

Phone 630-412-8989
www.customerlifecycle.us

Galloway Research Service

Founded 1967 | 50 employees
Elisa D. Galloway, CEO

For almost 50 years, Galloway Research Service has provided nationally-recognized quality data and insights across a multitude of research services.

Our expert team can partner with you from beginning to end (design, data collection and analysis) to obtain the insights you need to make intelligent business decisions. We provide intelligent research design and consulting, all types of traditional and creative cutting-edge data collection techniques and on-point analysis across a spectrum of methodologies. Our experts can assist with all types of research applications including customer satisfaction and loyalty, brand awareness and positioning research, new product and service development, advertising concept and tracking research and more.

Phone 210-734-4346
www.gallowayresearch.com

Just the Facts Inc.

Founded 1994
Bruce Tincknell, CEO

Just The Facts is now in its 25th year of providing high-quality, strategic full-service solutions to clients around the globe. We're experienced in a wide range of B2C and B2B categories delivering creative, strategic insights for results-driven research. JTF is a CASRO "elite" consultative strategic research firm providing clients with personal attention and turn-key solutions. Methodologies include focus groups, IDIs, surveys, mall studies, competitive and market intelligence, secondary search and mystery shopping. Using cutting-edge technology for online methods: focus groups, IDIs, white boards. Branding, customer insights, new products and strategic intelligence are specialties. Call today: 847-506-0033

Phone 847-506-0033
www.jtfacts.com

Market Probe International Inc.

Founded 1967 | 11 emplyees
Alan Appelbaum, CEO

Market Probe International Inc. is a global market research company providing business-to-business, health care and consumer research, both quantitative and qualitative, throughout the U.S. and worldwide. We provide a full range of research consulting, data gathering, programming, tabulating and analytical services. Methodologies include quantitative, qualitative, hybrid quant/qual research, online community development, virtual interviewing and more. We have extensive experience in diverse consumer and B2B categories. All of our services are available on an as-needed basis. Market Probe International is widely respected for offering a consistently high quality of market research support.

Phone 212-725-7676

www.marketprobeint.com

Murphy Research Inc.

Founded 2008 | 32 employees
Chuck Murphy, CEO

We understand that groundbreaking research lies at the intersection of science and creativity. A truly groundbreaking study evolves from the creative implementation of traditional and cutting-edge methodologies complemented by rigorous scientific analysis and visionary interpretation. It is this consistent implementation of creatively inspired science that separates us from the competition. We work with a broad array of clients on issues that pertain to every stage of the business cycle. We specialize in mission-critical strategic projects that span multiple methodologies and require cross-functional expertise.

Phone 310-394-7100
www.murphyresearch.com

Murray Hill National

Founded 2013 | 22 employees
Susan Owens, COO

Murray Hill National is your market research service provider. Our expertise is in field management, recruiting, moderator choice, screener design/development and sample solutions. Through various collaborations and partners, we can provide any service or request you have in relation to your marketing research needs! We have U.S. Class A facility options, as well as a 40-station call center with the ability to recruit all methodologies, moderator services worldwide and verified sample resources. We excel in our recruiting operations which include consumer, health care and B2B audiences. Call us today!

Phone 972-707-7645
www.murrayhillnational.com

Olson Research Group Inc.

Founded 1995 | 60+ employees
Charles Olson, CEO

Olson Research offers a full spectrum of qualitative and quantitative market research services with unique access to a robust proprietary database of 2.4 million U.S. health care professionals throughout the life sciences sector, including 960,000 active physicians. Precise targeting is available, including geo-location tracking and up to 75 unique profiling fields. We are best known for: Access – our unique and thorough reach to all facets of the U.S. health care decision maker population; Experience – our team of seasoned PMs having on average seven-plus years of industry experience; and Approach - our flexible and collaborative approach to project design, fielding and final deliverables.

Phone 267-487-5500
www.olsonresearchgroup.com

Rabin Research Company

Founded 1963 | 20 employees
Michelle Elster, President

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

Phone 312-527-5009
www.rabinresearch.com

Radius Global Market Research

Founded 1960 | 120 employees
Chip Lister, CEO

Radius Global Market Research has one focus: deliver better business performance for your brand. Fortune 500s and other industry leaders rely on Radius for strategic business-building guidance to optimize brand offerings, identify clear innovations and develop compelling customer propositions. We excel at addressing complex issues in development, marketing and communications in a wide range of industries from packaged goods and technology to financial services and health care. The Radius team is committed to bringing cutting-edge, custom research solutions to every engagement to maximize brand growth. We provide organizations what is needed to succeed: Clear thinking for a complex world.

Phone 212-633-1100
www.radius-global.com

RTi Research

Founded 1979 | 55 employees
David Rothstein, CEO

RTi helps turn insight into action. We are an innovative global full-service market research company and for 35 years, our clients have counted on us to connect the dots, tell the story and help them influence action. We are an AMA Gold Top 50 company and a Connecticut Top Workplace. Our clients – over a third of whom have partnered with RTi for 10+ years – work directly with our talented, experienced and dedicated senior team. No hand-offs! Clients come to RTi seeking higher level involvement, more insightful thinking and extraordinarily attentive service; they stay because we deliver. We support success.

Phone 203-324-2420
www.rtiresearch.com

SIS International Research Inc.

Founded 1984 | 75 employees
Ruth Stanat, CEO

SIS International Research are experts in full-service research as we deliver across market research projects from recruiting to data collection in qualitative and quantitative research. We also have a market and competitive intelligence division in addition to our strategy group. Our panels focus on hard-to-find C-level executives and key opinion leaders in the health care, consumer, B2B, industrial and automotive industries. SIS also delivers new product concept testing in the food, cosmetic and automotive industries. Our headquarters are located in New York with regional offices in Los Angeles, London, Shanghai and Manila. In addition, SIS operates our own focus group facility in the Flatiron district of NYC.

Phone 212-505-6805
www.sisinternational.com

Sivo Insights

Founded 2010 | 7 employees
Marilyn Weiss, Founding Partner
Cindy Blackstock, Managing Partner

Connected by the common core belief that "in the middle" is where life happens, Marilyn and Cindy bonded instantly upon meeting in 2010. That middle area, the elusive emotional territory that these two insight experts seek to deeply understand, inspired the name SIVO, which means Gray. SIVO Insights is an innovative full-service qualitative research firm that thrives under their leadership, which is a perfect balance of Cindy's drive and discipline and Marilyn's passion and approachability. Their fearless pursuit of deeper learning is shared by their talented team that represents a variety of experiences and specialties. Our people make the difference!

Phone 612-567-6830
www.sivoinsights.com

SMS Research Advisors

Founded 1989 | 12 employees
Jeri Meola, President/Founder

SMS Research Advisors is a full-service research and consulting firm based out of Minneapolis that specializes in helping Fortune 500 companies get great results using "voice of the customer" insights. Using these insights, companies are more purposeful in their decision-making, allowing them to grow and prosper by more fully operationalizing their customer experience, both for today and tomorrow. Our focus is to partner with market leaders like Toro, Eaton and Ecolab to foster innovation, create competitive value propositions and build customer advocacy that will ultimately improve business results. So what can we do for you?

Phone 952-939-4310
www.smsresearch.com

SSI (Survey Sampling International)

Founded 1977 | 4,000+ employees
Chris Fanning, President and Chief Executive Officer

SSI is the premier global provider of data solutions and technology for consumer and business-to-business survey research. SSI reaches participants in 90+ sample countries via Internet, telephone, mobile/wireless and mixed-access offerings. SSI staff operates from 40 offices and remote staff in 20 countries, offering sample, data collection, CATI, questionnaire design consultation, programming and hosting, online custom reporting and data processing. SSI's 4,000+ employees serve more than 3,000 clients worldwide.

Phone 203-567-7200
www.surveysampling.com

TURNER RESEARCH NETWORK

Turner Research Network

Founded 1997 | 4 employees
John Turner, CEO

Question: What makes an outstanding full-service research firm? Answer: Be an experienced, reliable resource to give the right advice for one's particular consumer and B2B insights needs. Plus, have the resources to execute that research effectively and efficiently. Turner Research Network is just such a firm. We have the full-service research toolkit to help companies, agencies and associations in their strategy development, product and service evaluations and marketing communications insights needs, among others. We also provide support and best practices consulting for do-it-yourself (DIY) research. Bring us your questions and we'll lead you to answers.

Phone 770-604-9980
www.turnerresearch.com

VISION STRATEGY AND INSIGHTS

Vision Strategy and Insights

Founded 2013 | 5 employees
Michele Cordoba and Brenda Lee, Founding Directors

As a research firm dedicated to the planning and implementation of successful multicultural research studies, VSI is strongly focused on the development of best-in-class, robust qualitative and quantitative methodologies to reach Hispanic, African American and Asian consumers 100 percent in-language and in-culture. We use only in-house moderators and analysts, assuring continuity in project management and strategy across the lifespan of a project. Our studies benefit from the experience and unique perspective of our culturally diverse and multilingual team, with RIVA-certified moderators assuring superior quality in every project we manage. Category expertise includes CPG, health care, retail, food/beverage, media, automotive, political and nonprofit.

Phone 818-261-8340
www.visionstrategyandinsights.com

Vital Findings

Vital Findings

Founded 2010 | 24 employees
Jason Kramer, CEO

Vital Findings is a market research consulting firm focused on custom research that delivers action. We are the leaders in visual design for research, both to improve quantitative data accuracy and to create insights deliverables that demand attention. We work with you to design custom qual and quant methodologies tailored to your company and industry using techniques like mobile ethnography, customer journey mapping, needs-based segmentation, qual communities and brand equity analysis. Our work stands out, literally: we use infographics, video reporting and insights workshops to tell the story behind the findings in a way that connects with key stakeholders.

Phone 310-279-5510
www.vitalfindings.com

Names of Note

■ In New York, **Anne Knight** has joined youth and family research firm *Smarty Pants* as an insights genius.

■ London-based health care research agency *Cello Health Insight* has appointed **Maria Eletskaya** as a director.

■ Westport, Conn., data and insights company *Critical Mix* has appointed **Erinn Taylor** as chief product officer.


Taylor

■ Research firm *FocusVision*, Fresno, Calif., has added **Dave Singleton** to its board of directors. Additionally, the firm has named **Steve August** as CMO and **Braden Johnstone** as senior vice president of operations. **Zoë Dowling** has joined as lead research strategist, **Michael Kuehne** has joined the firm's research strategy team as senior research strategist and **Jonathan Tice** has been promoted to senior vice president of North American Sales.

■ **Raj Sharma**, managing committee member for the *Market Research Society of India*, has been appointed as the media spokesperson for the society.

■ Mobile brand advertising firm *Kargo*, New York, has appointed **Edward Romaine** as CMO.

quirks.com/articles/2016/20161012.aspx

■ **Lauren Tucker** has joined Chicago research firm *Shapiro+Raj* as senior vice president of strategy, research and analytics.

■ Research firm *MARU/VCR&C*, New York, has appointed **Amanda Ram** as chief financial officer and **Carlos Palacio** as chief information officer, both based in the company's Toronto office. In New York, **Blake Burrus** has been named as senior vice president of its consumer, retail and shopper insights practice. In New York, **Bruce Friend**, president of the Media & Entertainment Practice at research firm MARU/VCR&C, has been appointed president of the Market Research Council. Friend assumed his new duties on July 1, replacing **Leslie Wood**, chief research officer of Nielsen Catalina Solutions. He will continue in his current role with MARU/VCR&C.


Palacio


Friend

■ **Sue Symons** has rejoined research firm *Moore & Symons*, Roswell, Ga., as senior vice president, heading up the Virginia office.

■ Spain-based travel intelligence company *ForwardKeys* has appointed **Laurens van den Oever** as CMO, a newly-created role.

■ Digital marketing company *HelloWorld*, Southfield, Mich., has appointed **Chris Bennett** as vice president, managing director of the company's Seattle office. The firm has also promoted **Josh Yaker** to general counsel.

■ **Kelly Christiansen** has joined Waukesha, Wis., health care marketing agency *The Roberts Group* as an account executive.


Christiansen

■ In New York, *Ipsos* has appointed **Sherrill Mane** as head of MAdTech Strategy, U.S., Ipsos Connect.

■ Digital automotive marketplace *TrueCar Inc.*, Santa Monica, Calif., has appointed **Art Oleszczuk** as vice president of market research.

■ *CMT*, a Nashville, Tenn., TV and digital channel, has hired **Rory Levine** as vice president of consumer marketing.

■ **Christine Benn** has joined Baldwinsville, N.Y.-based *Research & Marketing Strategies Inc.* as business development coordinator.


Benn

■ *The International Council of Shopping Centers*, New York, has appointed **Bill Kistler** as executive vice president and managing director of EMEA.

■ San Francisco-based app data and insights firm *App Annie* has appointed **Al Campa** as CMO.

■ U.K. online retailer *Shop Direct* has hired **Gael Decoudu** as head of data science and digital analytics.

■ **Charles Kaplan** has joined retail merchandising, business intelligence and software firm *Mi9 Retail*, Miami, as senior vice president of marketing.

■ Van Nuys, Calif., researcher *SoapBoxSample* has hired **Jens Erickson** as a senior account executive.

■ New York-based digital agency *Wunderman* has appointed **Caspar Schlickum** as CEO for the Asia-Pacific region.

■ *MarketVision Research*, Cincinnati, has hired **Claudia Almanza** and **Douglas Flournoy** as research associates for its graphic design team and **Chela Jones** as a research associate for its qualitative field services team.

■ Satellite TV provider *DISH*, Englewood, Colo., has named **Jay Roth** as senior vice president and CMO.

■ **Peter Johnson** has joined *RMS Healthcare*, a division of Baldwinsville, N.Y., firm Research & Marketing Strategies Inc., as health care transformation specialist. Traci Angyal has joined as administrative associate.


Johnson

■ In Beverly Hills, Calif., media and entertainment company *Starz* has promoted **Alison Hoffman** from executive vice president of marketing to the newly-created position of CMO.

■ *Retailer Staples Inc.*, Framingham, Mass., has named **Steve Matyas** as president, North American retail.

■ U.K. researcher *Marketing Sciences Unlimited* has hired **Nicola Gibbs** as a research director for its FMCG team.

■ Minneapolis-based product lifecycle solutions company *Logic PD* has hired **Carlos Berger** as director of business development.

■ **Gayle Fuguitt**, CEO and president of *The Advertising Research Foundation*, New York, has notified the board of directors that she will not renew her contract upon expiration. She will continue to lead the organization until October 31, 2016.

■ **Norbert Negrea** has been tapped as research manager at *MFour Mobile Research*, Irvine, Calif. **Cristian Ghiurea** has joined the firm's Labs & Engineering department as a software engineer. In operations, **Spencer Hall** has been named project manager and **Katherine DiPlacito**, **Anna Pabiadzimskaya**, **Bruce Rowan** and **Anthony Nguyen** have joined as research associate. **Rebecca Young** has been added as project manager for MFourDIY, the firm's survey-building tool.


Negrea


Ghiurea


Hall


Young

■ Information services company *Neustar Inc.*, Sterling, Va., has appointed **Venkat Achanta** as chief data and analytics officer. He will be based in San Francisco.

■ **Laurel Bernard** has joined New York-based marketing technology company *Simulmedia* as president, entertainment marketing.

■ *Turner Europe*, Middle East and Africa (EMEA), part of Atlanta-based media company Turner, has named **Pedro Cosa** as VP insights and analytics.

■ *Radius Global Market Research* has hired **Kelly Coyne** as vice president in the firm's New York office.


Coyne

■ **Kate Bruce** and **Brynne Sekerak** and have joined Durham, N.C., research firm *W5* as practice consultants.

■ Vietnam-based research firm *Decision Lab* has brought on six market researchers as part of its market research consultant program. The company selects six students or new graduates for the program and trains them as research consultants. The six new market researchers are signed up to an 18-month program, which must be completed before they graduate as consultants.

■ *GfK*, New York, has appointed **James Kennedy** as business group director for POS Tracking (Optics).


Kennedy

■ Palo Alto, Calif.-based *SurveyMonkey* has appointed **Tom Hale** as president.

■ U.K. research firm *Mustard* has appointed **Laura Lyon** as senior research manager and **Irina Dimitriade** and **Hannah Barnsley** as research executives. The firm has also promoted **Anthony Shephard** to associate director and **Jack Melton Bradley** to research manager.

■ Multichannel marketing software

provider *BlueVenn*, Boston, has appointed **Curt Bloom** as president of its operations in the U.S. The firm has also appointed **Kate Popp** as client services executive and **Neil Mutalik** as business development executive.

■ London-based tech market research company *DigitalMR* has appointed **Maksim Sipos** as its first full-time CTO.

■ U.K. research firm *Cello Health Insight* has appointed **Duncan Munro** as the joint head of IQ, its specialist quantitative research practice.

■ **Christina Herrmann** has joined research firm *Smarty Pants*, New York, as quantitative insights genius.


Geoffret

■ Oslo, Norway-based research firm *Norstat UK* has named **Xavier Geoffret** associate director - consultancies. Separately, **Michal Junik** has been appointed as the new managing director of Norstat Poland.


Junik

■ *Hyatt Hotels Corporation*, Chicago, has appointed **Jen Acerra** as vice president, global brand research and insights and **Heather Geisler** as vice president, creative and field marketing.

■ **David Stewart**, the President's Professor of Marketing and Business Law at *Loyola Marymount University* in Los Angeles, has affiliated with Waltham, Mass., research firm *Applied Marketing Science Inc.*'s Litigation Support practice.

■ **Melissa Cropsey** has joined *Rain@ Infogroup*, an agency for small and mid-size businesses from Omaha, Neb., marketing services firm Infogroup, as director of digital services.

■ In Arlington, Texas, **Nicole Smith** has been appointed as CMO for the *WNBA* Dallas Wings.

■ U.K.-based research firm *OnePoint Global* has appointed **Rick Carbone** as corporate advisor and interim CFO for all OnePoint Global entities worldwide.

■ London-based researcher *Dub* has hired **Simona Kats** as senior research consultant and **Gareth Mellor** as marketing manager.


Clemens

■ **Abbey Clemens**, a senior director at London-based researcher *LRWTonic*, was voted onto the board of AQR (Association for Qualitative Research).

■ **Ron Wilson** has joined management consulting firm *Kurt Salmon*, Atlanta, as a partner in its Retail and Consumer Goods Group and as a leader in its data analytics practice. He will be based out of the firm's New York office.

■ Programmatic audience company *Xaxis*, New York, has promoted Lucas Mentasti to CEO, Latin America.

■ *TRC Market Research*, Philadelphia, has hired **Kevin Dona** as senior vice president.

■ **Grant Bird** has joined U.K. research and strategy collective *house51* as partner.

■ Indianapolis-based retailer *hhgregg* has named **Chris Sutton** as senior vice president of marketing. His responsibilities will include providing strategic direction to hhgregg's customer insights group.

■ Chicago research firm *Fieldwork* has named **Megan Pollard** president of Fieldwork Network. She will continue serving as facility president of Fieldwork Chicago-Downtown.

■ U.K.-based *DJS Research* has added **Kelly Wray** as senior research executive, **Anna Teofilo-Sanchez** as a research executive and **Lottie Connolly**, **Naomi Potter** and **Emma France** as junior research executives. The company has also appointed two new members to the operations and support teams within the business, adding **Liz Kershaw** as an accounts assistant and **Alison Davidson** as a senior field executive. In addition, the company promoted five staff members: **Kate Slater** to research director; **Charlotte Sykes** to associate director; and **Rebecca Harris**, **Alex McCluckie** and **David Marchant** to senior research manager.

■ Port Washington, N.Y.-based *Paradigm Sample* has named **Andy Pyle** as chief research officer.

■ **Lenny Murphy**, who has served on the advisory board of *Virtual Incentives* for several years, now has an expanded role with the New York-based rewards and incentives company as the new chief client engagement strategist. Murphy will maintain his current role at *GreenBook*.

■ The board of directors of Reston, Va., research firm *comScore* has named company co-founder **Gian Fulgoni** as its chief executive officer. **Magid Abraham**, who co-founded comScore with Fulgoni, resigned as executive chairman of the comScore board of directors in July. Fulgoni most recently served comScore as chairman emeritus, a role he has held since 2014, and he will continue to serve on the board. **Serge Matta** will serve as executive vice chairman and advisor to the chief executive officer. Concurrently with the appointment of Fulgoni, the company implemented additional strategic changes to its executive leadership. **Bill Livek**, comScore's executive vice chairman and president, will assume strategic and day-to-day responsibility for the expansion of comScore's TV, cross-platform and movie measurement businesses. The company also appointed **David Chemerow** as CFO. **Melvin Wesley III**, who most recently served as the company's CFO, has discontinued his role as such and will remain with the company to assist in the company's transition to Chemerow.

■ **Matthias Hartmann**, CEO of *GfK*, Nuremberg, Germany, has mutually agreed with the supervisory board of GfK SE that he will leave the company as of December 31, 2016. His departure is the result of differing views regarding the long-term direction of the business between Hartmann and the majority shareholder, GfK Verein. Until the end of the year, Hartmann will transfer his responsibilities to his management board colleagues. **Gerhard Hausruckinger** assumes the role as interim speaker of the management board as of September 1, 2016, in addition to his current role as management board member responsible for the consumer choices sector. In addition, **Arno Mahlert** resigned as chairman of the supervisory board effective September 12, 2016, given differences of opinions in the cooperation with the majority shareholder.

■ Research company *LRWTonic* has added **Carolina Jiménez** to its New York team in the role of research director. Also joining the team are Allegra Oxborough, as senior research executive, and **Megan Routh** as research executive.


Jiménez

■ In Plainsboro, N.J., **Mike Falvo** has joined health care research firm *HRA Healthcare Research & Analytics* as vice president of market research.

■ **Julio Franco** has joined London-based research technology firm *ZappiStore* as vice president Americas for the Eastern Region.


Franco

■ *AOL*, New York, has promoted **Marc Misseri** to senior manager in New York and **Hannah Whipps** to manager in San Francisco. Both are members of the Consumer Analytics & Research group.

■ Nashville, Tenn., e-mail marketing firm *Emma* has appointed **Peter McCormick**, co-founder of ExactTarget (now Salesforce Marketing Cloud), to its board of directors.

■ *MarketVision Research*, Cincinnati, has appointed the following: **Tayler Fisher**, **Morgan Beagle**, **Laurie Sites** and **Adina Gegprifti** as research assistants in its quantitative client service team; **Alexandra Shultz** as research assistant in its pharmaceutical qualitative research team and **Hannah McIntosh** as research assistant in its marketing research online communities team.

■ Boston-based research and advisory firm *Lux Research* has named **Mike Coyne** as president and CEO.

■ Consumer products and technology company *U-Vend Inc.*, Santa Monica, Calif., has appointed **Michael Crone** as senior vice president.

■ *Macy's Inc.*, Cincinnati, appointed **Richard Lennox** as CMO, effective September 15.

■ **Michaela Rojkovicova** has joined London-based research solutions firm *E-Tabs* as a client consultant.

■ **Daniel McDonald** has been named vice president of research for the *National Association of Broadcasters* (NAB), Washington, D.C. McDonald will be head of NAB Research, a division of the NAB Communications Department.

Research Industry News

News notes

■ **The CASRO Institute for Research Quality** awarded certification to Fort Washington, Pa., health care and life science services company **M3 USA** on June 28 for compliance to the ISO 27001 standard. ISO/IEC 27001 is a program that requires an organization to implement and maintain a structured information security and data governance framework. Separately, CASRO Institute for Research Quality has awarded certification to Rockville, Md., research and analysis firm **EurekaFacts** for compliance to the ISO 20252 Standard for Market, Opinion and Social Research. ISO 20252 establishes globally-recognized terms, definitions and service requirements for project management in research organizations.

■ Jeff Savitz, CEO of Philadelphia research firm **SavitzConsulting**, has uncovered new methods for reducing sample sizes in survey research, identifying "inliers" within a sample that have predicting error rates only two-thirds that of a random sample. According to Savitz, "These inliers are uniformly present in most all demographic and psychographic groups, making them useful for estimating population parameters for virtually any consumer target." Since only two-thirds as many of the inliers are necessary to achieve the same margins of error, this could substantially reduce sample costs, Savitz said.

quirks.com/articles/2016/20161013.aspx

■ Research company **M3 USA,** Fort Washington, Pa., has been awarded the EU-U.S. Privacy Shield Certification by the **U.S. Department of Commerce**. The certification replaces the Safe Harbor Agreement, with which M3 was already compliant. The new data protection framework between the U.S. and EU was adopted by the European Commission on July 12 and is designed to better protect the transfer of EU citizens' Personally Identifiable Data between the EU and U.S.

■ U.K. research technology firm **RealityMine** has joined a newly-created member class, **Provider Associates**, at Geopath, a New York-based not-for-profit organization that provides audience location measurement on behalf of the out-of-home advertising industry. Geopath, formerly known as the Traffic Audit Bureau for Media Measurement, recently opened the new member class to welcome organizations that provide data, research, software and technology to its membership.

Acquisitions/transactions

■ **Nielsen**, New York, has completed its acquisition of sports measurement, evaluation and intelligence firm **Repucom**, expanding Nielsen's sports offerings globally. Nielsen's acquisition of Repucom includes all operations, data, advanced analytic IP and tools and ongoing client work. As a result of the acquisition, Nielsen clients will be able to use Repucom's methodologies.

■ Location-based mobile marketing firm **Verve**, New York, has acquired **ROXIMITY**, a location-based analytics and advertising platform based in Denver. The acquisition combines Verve's location and mobile device data with ROXIMITY's beacon hardware and analytics tools to help marketers observe and influence consumer behavior.

■ **Gartner**, Stamford, Conn., has acquired **SCM World**, a cross-industry peer network and learning community based in London that provides subscription-based research and conferences powered by supply chain practitioners. Gartner will introduce SCM World's supply chain services to Gartner's clients and Gartner's supply chain-focused research and advisory services to SCM World clients. Gartner will also develop a range of supply chain products and services to accelerate growth globally for both companies. Terms of the deal were not disclosed.

■ Natick, Mass., data and intelligence firm **Definitive Healthcare** has acquired **Billian's HealthDATA**, an Atlanta-based data and analytics firm, expanding Definitive's data on health care providers and facilities. The deal closed on June 22 and the companies have already begun to integrate the organizations. Terms of the deal were not disclosed.

■ London-based communications firm **WPP** has acquired **Conexance**, a database marketing company based in France. Following acquisition, Conexance will work with WPP's Data Alliance companies Wunderman, Kantar and GroupM.

■ **GameAnalytics**, a Copenhagen, Denmark, behavioral analytics platform for game developers, has been acquired by China-based mobile ad tech company **Mobvista**. Terms of the deal were not disclosed.

■ Rhinebeck, N.Y., research firm **Phoenix Marketing International** has acquired **SYNERGISTICS Research Corporation**, an Atlanta-based research firm for the financial services industry. The new division will operate under the brand name Phoenix SYNERGISTICS and will be run by Bill McCracken, who remains SYNERGISTICS CEO and also becomes Phoenix EVP, and Genie Driskill, SYNERGISTICS COO, who also becomes Phoenix EVP. Both will report to Neal Chambliss, co-president, financial services at Phoenix Marketing International.

■ **Research America**, Philadelphia, has completed its acquisition of assets of health care researcher **Sigma Group LLC**, based in Lincoln, Neb. The firm has also acquired Viewpoint Consulting, a Langhorne, Pa., agency specializing in pharmaceutical payer research to augment its existing pharmaceutical offerings. Viewpoint Consulting's founder Norm Smith and his research team will continue to support their clients from their current office location. Smith has also been named director of payer research in the new alliance.

■ Jersey City, N.J., data analytics provider **Verisk Analytics Inc.** has signed a definitive agreement to acquire **Greentech Media Inc.**, a Boston-based information services company for the electricity and renewables sector. Greentech Media will become part of Wood Mackenzie, a Verisk Analytics business, and will provide Wood Mackenzie clients with market intelligence across several categories, including solar generation, energy storage and smart grids that react to changes in supply and demand. The transaction is expected to close in the third quarter of 2016, subject to the completion of customary closing conditions.

■ Dayton, Ohio-based big data analytics company **Teradata** has purchased **Big Data Partnership**, a U.K.-based services provider of big data solutions and training. Big Data Partnership will join Teradata's Think Big consulting practice. The terms of the acquisition agreement were not disclosed.

■ E-commerce platform **Magento Commerce**, Campbell, Calif., has acquired cloud-based analytics platform **RJMetrics**, based in Philadelphia. The Magento core platform will now include a native solution allowing merchants to better understand and optimize their commerce business based on data and insights into customers, merchandising, channels and more. The new solution will be marketed as Magento Analytics.

■ Cincinnati-based customer engagement firm **84.51°**, a wholly-owned subsidiary The Kroger Co., has merged with Deerfield, Ill., predictive analytics company **Market6**, which has offices in Cincinnati and suburban Chicago. 84.51°'s objective is to leverage Market6's technology, IP and people to expand its work with The Kroger Co., as well as Kroger's regional grocery retailers and the CPG business. Fifty-five Market6 employees located in Cincinnati and Chicago will now be employed by 84.51°.

■ Marketing technology firm **Zeta Interactive**, New York, has acquired Little Rock, Ark., data, analytics and software-as-a-service company Acxiom's e-mail services unit **Acxiom Impact**. As part of the agreement, Zeta has entered into a long-term strategic partnership with Acxiom.

■ **Lynx Research Consulting**, Boise, Idaho, has acquired **Drake Insights** of New York City, led by Terrett Drake. The move is designed to expand Lynx Research Consulting's capabilities in Drake Insights' areas of strength: automotive, media/advertising, health care, brand strategy and communications testing, as well as expand the operating capacity for Drake Insights to provide Lynx Research Consulting's quantitative offerings in addition to Drake Insights' qualitative portfolio.

Alliances/strategic partnerships

■ Researcher **Qualtrics,** Provo, Utah, has formed a partnership with **Slack**, a San Francisco-based team communication platform. This partnership enables Qualtrics users to conduct surveys and receive notifications within Slack, enabling organizations to measure and respond to customer feedback in real-time.

■ **Kantar Worldpanel**, London, has formed a global partnership with **Facebook**, Menlo Park, Calif., that brings Facebook mobile ad exposure data into Kantar Worldpanel's Consumer Mix Model (CMM) service. The enhanced CMM tool, which combines Facebook's mobile ad exposure data (in addition to desktop) with Kantar Worldpanel's consumer packaged goods purchase data, allows brands and advertisers to understand the impact of individual advertising campaigns on actual sales and the contribution Facebook and other media have on their return on investment.

■ In New York, data-driven marketing firm **Experian Marketing Services** and information services company **Neustar Inc**. have partnered to provide marketers with data onboarding solutions that can be used to enhance addressable coverage and expanded activation options across direct match partners in addressable media channels, including mobile, display, e-mail and TV. Using Neustar's Omnichannel Onboarding, a data onboarding solution, advertisers and marketers have the ability to onboard audience segments derived from transactions, such as point-of-sale data, credit card purchases and more. Additionally, the partnership enables marketers to leverage joint capabilities from marketing platforms from either Experian or Neustar.

■ Research company **Kantar**, London, has signed an affiliation agreement with **Rahbar Bazaar Market Research** Institute, based in Iran.

■ Finland-based audience measurement company **Verto Analytics** and New York-based statistics company **Statista** have formed a research partnership. Verto Analytics will provide Statista with ongoing research deliverables and measurement data based on its single-source digital cross-device audience measurement methodology. Verto's research data currently covers adult consumers ages 18 and over in the United States, United Kingdom and China, with additional countries in Europe and Asia to follow in the coming months. Verto Analytics' data and insights will be available exclusively to Statista subscribers through their online statistics portal.

■ **ComScore**, Reston, Va., has expanded its partnership with Montgomery, Ala., TV broadcasting company **Raycom** for comScore's local television viewing information across five new Raycom television markets. With this agreement, comScore now has 56 TV markets under contract with Raycom.

■ Plano, Texas, firm **Research Now** and Canada-based shopper insight firm **Lucros Partners** have formed a partnership to sell Shopper Intelligence in the U.S. market. Shopper Intelligence is an international quantitative measurement research program that is based on interviewing shoppers from all major categories, brands and retailers in one benchmarking process. The U.S. program for Shopper Intelligence provides customer views into over 130 product categories across more than 20 retailers in the food and beverage industries, giving manufacturers and retailers access to a range of attitude and shopper behavior metrics from both online and brick-and-mortar shopping experiences. The inclusive data set is provided through an online dashboard, with additional analysis and insights provided by Lucros Partners.

■ India-based researcher **MRSS India Ltd.** has been selected by India-based health care and fitness start-up **CureFit Healthcare Pvt. Ltd.** as its research partner for its strategic market research requirements. The research by MRSS India aims to help CureFit fine-tune its business concept and provide insights to aid in the business launch, scheduled for 2017, through multiple research surveys involving consumers and various health care sector professionals. The contract will be a year long with the research covering markets across India.

■ Marketing research companies **Copernicus Marketin**g and **Forbes Consulting Group** have joined Isobar, a Chicago-based digital marketing agency. All three companies are part of Dentsu Aegis Network. Together they will form Isobar's Marketing Intelligence Practice.

■ Plano, Texas, firm **Research Now** has partnered with Stamford, Conn., research technology firm **FocusVision**. Research Now will use FocusVision's Decipher technology platform, which uses a mobile-first approach to survey design and data collection, while also providing reporting and data visualization capabilities.

■ Wilton, Conn., research solutions firm **Toluna** has partnered with **ClickZ**, a New York-based publisher of digital marketing news, research and insights for marketing professionals. The partnership will facilitate a joint effort between the two firms to conduct real-time survey research on key topics of interest.

■ **The Food Marketing Institute** (FMI), Arlington, Va., and **Nielsen**, New York, have formed a strategic analytic alliance to uncover insights on the "Digitally Engaged Food Shopper." Results from the multi-year initiative will focus on current and future digital shopping behaviors, incorporating perspectives from retailers, CPG manufacturers and technology providers, along with consumer research by FMI and Nielsen.

Association/organization news

■ **ESOMAR** has appointed London-based research language services firm Language Connect as its official translation partner. ESOMAR has also launched its multi-language online portals for its Web site (now available in French, Japanese, Arabic, Spanish, Chinese and German) and now offers all of its guidelines, as well as its professional standards resources, translated into those same languages.

■ **The Qualitative Research Consultants Association** (QRCA), St. Paul, Minn., will again offer its Young Professionals Grant (YPG) program, providing at least 10 grants. The YPG program aims to help advance the careers of young qualitative researchers by giving them the opportunity to network with professionals and learn from presentations on qualitative research at the QRCA's conference. The grant includes full registration fees to attend QRCA's upcoming annual conference in Los Angeles on January 18-20, 2017. The closing date for applications is November 1 and winners will be notified by November 15. Additional information and the application form can be found at www.qrca.org/ypg.

■ **The Qualitative Research Consultants Association** has retained Franklin, Tenn., firm Harpeth Marketing to provide a variety of marketing support functions.

Awards/rankings

■ Michelle Andre, vice president of marketing for Fishkill, N.Y., firm **Virtual Incentives**, has been named a winner in the **Women World Awards** in the Executive of the Year category. Andre was selected for the award based on her vision, strategy and implementation of full spectrum marketing programs for Virtual Incentives. Winners were honored in San Francisco on June 27 during the annual SVUS Red Carpet Awards Ceremony Dinner.

■ **The American Marketing Association** and the **American Marketing Association Foundation** have named Michel Wedel, the PepsiCo Chaired Professor of Consumer Science at the Robert H. Smith School of Business and a professor at the University of Maryland, as the recipient of the Charles Coolidge Parlin Marketing Research Award. The award honors achievements in advancing the market research industry and recognizes innovative techniques in a range of areas spanning new marketing research concepts, methods, measurement and analysis. Wedel specializes in the development and application of statistical and econometric methods for research in marketing.

■ Paris-based communications research agency **iligo** won multiple awards at the Research Innovation competition sponsored by France's Offremedia. The agency won the Grand Prix as Research Challenger for 2016 as well as two gold awards for quality in research reporting and methodological approach. It also won silver awards for innovation for its data collection methods and for its studies in the categories of media audiences, brand advertising and point-of-sale optimization.

■ Warren, N.J., digital data collection firm **Lightspeed GMI's** Vice President of Research **Jon Puleston** and Research Innovator **Alexander Wheatley** were named individual **WPP Atticus Award** recipients for Research in Practice. Open to professionals working in WPP companies, the annual Atticus Awards recognize original published thinking in communications services.

New accounts/projects

■ Austin, Texas, supermarket **Whole Foods Market Inc.** has selected **Nielsen**, New York, as its primary U.S. analytics provider for point-of-sale data, consumer insights and industry metrics. Nielsen is working with the company to create a customized natural and organic product hierarchy that will provide a view of Whole Foods Market's product categories, including ingredient level attributes.

■ **Study Hall Research**, Tampa, Fla., has been retained by the Atlanta office of integrated communications firm **BBDO** to conduct a multi-phased research initiative for a client in the consumer packaged goods category. As a part of the engagement, Study Hall will conduct both qualitative and quantitative consumer research initiatives to provide research-based insights for product development, product positioning, marketing and merchandising. Separately, Study Hall Research has completed a strategic brand research initiative for Space Florida, Titusville, Fla., and its St. Petersburg, Fla.- based communications agency Paradise. The study was commissioned to explore a range of strategic and branding issues for Space Florida and to evaluate vacationers' behaviors with regards to space program-focused travel and utilization of information sources. Additionally, Veterans Florida has renewed its contract with Study Hall Research for longitudinal awareness, attitude and perception tracking among active U.S. military service members, veterans and spouses.

New companies/new divisions/relocations/expansions

■ **Yahoo! Inc.**, Sunnyvale, Calif., has launched Yahoo Storytellers, a full-service content marketing studio for brands and agencies that uses Yahoo's editorial content, data and native advertising through Yahoo Gemini. Marketers can leverage Yahoo Storytellers to develop, distribute and measure premium branded content that meets consumers' expectations and drives engagement. Yahoo Storytellers also offers advertisers a full-suite of capabilities to build successful content marketing strategies, including content consulting services and curriculum-based workshops, development of premium video and a full range of editorial content, influencer activations across social platforms and partnership extensions.

■ Researcher **GfK**, New York, has collaborated with research facilities firm **Fieldwork** to establish a user experience (UX) research studio in Boston. The GfK UX lab within Fieldwork is equipped with technologies that enable digital capture of audio and video media, along with other specialized tools such as eye-trackers and mobile device camera rigs. The lab is able to accommodate one-on-one interviews, focus groups, workshops and simulated environments.

■ Sweden-based research software firm **Dapresy** has opened a new office in London, with Marc Chester being appointed as the new director of Dapresy U.K.

■ Belgium-based consumer insights and collaboration agency **InSites Consulting** has opened a new office in Düsseldorf, Germany.

■ Research company **i-view London** will be moving to a new site on The Strand following funding by London-based banking and financial services firm HSBC. The new site will allow the company to reach a wider international audience from across Europe, the U.S. and Asia-Pacific, as well as add five new staff members to its team.

■ U.K.-based research fielding company **Field Scope International** has opened an office in New York. The new office will cover the U.S. market and will provide clients with recruitment and field services in the health care research sector.

■ **CRG Global** of Ormond Beach, Fla., has recently opened a new Test America qual/quant studio in Santa Anita, Calif. The new office includes a consumer test kitchen, laundry and fragrance-testing rooms, a dedicated shopper insights room and a viewable multipurpose room.

■ Research and technology company **Aha!** has relocated to the Water Wheel Centre building in downtown Northville, Mich.

■ Arlington, Va., firm **Hanover Research** has opened a new office in New York City. The New York office is the company's fourth location.

■ In Chicago, **Cannabiz Consumer Group** has launched to provide research and tracking services to markets disrupted by the legalization of marijuana. Cannabiz has a team with expertise in market measurement and tracking, consumer and shopper segmentation and targeting, sales activation, trade area assessment and predictive analytics. Combined with data collection, data sciences and data processing technologies, Cannabiz provides consumer goods and services industries and retailers guidance on how to manage their businesses within legalized markets. Leslie Townsend is CEO of the company.

■ Health care consulting and research firm **Kantar Health**, New York, has expanded its presence in Israel to better partner with companies in Israel's life sciences industry. As part of the expansion, Kobi Sharon has been named vice president, client consulting and is based in Israel. Kantar Health will offer its marketing insights and evidence solutions to multinational corporations and local biotech, medical technology and mHealth companies in Israel. These solutions include filling and identifying the gaps in disease management; demonstrating value for their products - commercially and clinically; ensuring regulatory, efficacy and safety requirements are fulfilled; driving and maximizing brand performance and mapping and leveraging the patient journey.

■ London-based research and consulting company **YouGov** has opened an office in Washington, D.C. The new office will focus on custom, academic, public affairs and public opinion research, building primarily on YouGov's capabilities in Redwood City, Calif., and San Francisco. To lead the new office, Amy Emmatty has joined the company and has been appointed as managing director, D.C.

■ **Nichols Research**, Fremont, Calif., has completed a remodel of its flagship office in San Francisco's financial district and has expanded its Fresno, Calif., office. Additionally, the company has promoted Grace La Mer to vice president of compliance and Sami Biggs to vice president of operations. The firm has also expanded its company Web site.

■ Business-to-business customer experience consulting firm **Walker Information** has announced plans to expand its operations and construct a new headquarters facility in Indianapolis. Walker, in partnership with real estate developer PK Partners, will invest $11 million to build a new 54,000-square-foot building on Indianapolis' north side. Walker expects to complete the move by the end of 2017, relocating from its current facility. The firm also plans to expand its services and increase its consulting capabilities and continue hiring for consulting, analytic, information technology and project management positions.

■ Wilton, Conn., researcher **Toluna** has opened an office in Dubai, UAE. It will be led by Nader Kobeissi, general manager of Toluna MENA.

■ Insurer **Allstate**, Northbrook, Ill., has launched a standalone telematics unit called Arity which will collect data on drivers and sell analytics products to third parties, including other insurance providers.

Research company earnings/ financial news

■ Data visualization and reporting software firm **Dapresy**, Portsmouth, N.H., reported record first-half 2016 financial results with organic growth of more than 50 percent versus the similar period in 2015. The company's growth included three new hires, including Marc Chester as director of Dapresy UK and Bob Hull and Jeff Martin, both vice presidents of business development for Dapresy North America, as well as new client relationships in North America, Europe and Australia and the launch of its Pro Version 10 solution.

■ **Nielsen**, New York, reported revenues of approximately $1.6 billion for the second quarter of 2016, up 2.4 percent or 4.5 percent on a constant currency basis, compared to the second quarter of 2015.

■ U.K. agency **DJS Research** reported a turnover of £4.2 million for 2015-16, a 17 percent growth from last year's £3.6 million.

■ **Forrester Research Inc.**, Cambridge, Mass., reported total revenues of $87.8 million for the second quarter of 2016, compared to $82.8 million for the second quarter of 2015. Research revenues increased 5 percent and advisory services and events revenues increased 9 percent compared to the second quarter of 2015.

■ **National Research Corporation**, Lincoln, Neb., reported revenue of $26.1 million for second-quarter 2016 (ended June 30), up 7 percent compared to $24.5 million for the same quarter in 2015.

■ **Gartner Inc.**, Stamford, Conn., reported total revenue of $610 million for second-quarter 2016, an increase of 11 percent over second-quarter 2015. Research revenue for second-quarter 2016 was $449.2 million, up 16 percent compared to second-quarter 2015. Consulting revenue was $94.1 million, an increase of 6 percent compared to 2015 and events revenue was $66.8 million compared to $73.9 million in second-quarter 2015, a decrease of 10 percent due to changes in its events calendar.

■ **IDI Inc.**, a Boca Raton, Fla., data and analytics company, reported revenue of $41.0 million and adjusted EBITDA of $3.1 million for the second quarter ended June 30, 2016. Of the total revenue, the Information Services and Performance Marketing segments contributed $13.4 million and $27.6 million, respectively, for the second quarter 2016, compared to total revenue of $1.0 million, with Information Services and Performance Marketing segments contributing $1.0 million and $0 million, respectively, for the second quarter 2015. Net cash provided by operating activities was $1.1 million for the six months ended June 30, 2016, compared to net cash used in operating activities of $4.5 million for the six months ended June 30, 2015. The company reported a net loss of $7.2 million for the second quarter 2016, compared to a net loss of $45.5 million for the second quarter 2015.

■ Audience technology company **YuMe Inc.**, Redwood City, Calif., has reported revenue of $40.7 million for second-quarter 2016, compared to $40.4 million in the second quarter of 2015.

CALENDAR OF EVENTS

••• can't-miss activities

Confirmit will hold a one-hour Webinar, titled 'Seeing is Believing: Visualizing Market Research Data,' on **October 4** at 10:00 a.m. CDT. Visit bit.ly/2aXj5fB.

AMA will hold its 2016 Annual Conference on **October 5-7** at Loews Sapphire Falls Resort in **Orlando, Fla.** Visit www.ama.org.

SAPOR will hold its 2016 Annual Conference on **October 6-7** at City Club Raleigh in **Raleigh, N.C.** Visit www.sapor.us/conferencesevents.

Fuller Research Group will hold The Weird and Wonderful World of Field – Fieldwork Conference 2016 on **October 13** at the London Zoo in **London**. Visit thewwwf.com.

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

Applied Marketing Science will hold a training workshop, Listening to the Voice of the Customer, on **October 19-20** in **Chicago**. Visit ams-insights.com/training-coaching/upcoming-workshops.

The 2016 European Pharma Market Research Conference will be held on **October 20-21** at the Westin Grand Berlin Hotel in **Berlin** Visit europe.pharmamarketresearchconference.com.

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

CASRO will hold its 41st Annual Conference on **October 24-27** in **Park City, Utah**. Visit www.casroannual.com.

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 Merlien Institute will hold its MRMW Africa conference on **November 1-2** in **Cape Town, South Africa**. Visit africa.mrmw.net.

Global Executive Events will hold its Unleashing Data Excellence event on **November 7-8** at De Rode Hoed in **Amsterdam**. Visit dataams16.globalexecutiveevents.com.

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.

NEMRA will hold its Fall Conference on **November 10** at The Conference Center at Waltham Woods in **Waltham, Mass**. Visit newenglandmra.com/nemra-event/nemra-2016-fall-conference.

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

AMA will hold its 2016 Advanced School of Marketing Research on **November 14-18** at the Terry Executive Education Center in **Atlanta**. Visit www.ama.org.

The Strategy Institute will hold its 3rd Annual Digital Marketing for Financial Services Summit event on **November 15-16** at the Wyndham New Yorker Hotel in **New York**. Visit bit.ly/295Rh8l.

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.

MRS will hold its Financial Services Research conference on **November 17** in **London**. Visit www.mrs.org.uk.

The Strategy Institute will hold its Fifth National Summit on Data Analytics for Healthcare event on **December 8-9** in **Toronto**. Visit www.healthdatasummit.com.

The MREF will be taking a vision trip to Haiti to visit The Joseph School and other schools on **January 12-15**. Visit mrgivesback.org.

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.

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.

U.S. Postal Service Required by 39 U.S.C 3685 Statement of Ownership, Management and Circulation 1. Title of Publication: Quirk's Marketing Research Review. 2. Publication No.: 0893-7451. 3. Date of Filing: Sept. 19, 2016. 4. Frequency of Issue: Jan., Feb., Mar., Apr., May, June, July, Aug., Sept., Oct., Nov., Dec. 5. No. of Issues Published Annually: 12. 6. Annual Subscription Price: None and $70.00. 7. Complete Mailing Address of Known Office of Publication: 4662 Slater Road, Eagan, MN 55122-2362. Contact: Steve Quirk. Telephone: 651-379-6200. 8. Complete Mailing Address of the Headquarters of General Business Offices of the Publisher: 4662 Slater Road, Eagan, MN 55122-2362. 9. Full Names and Complete Mailing Address of Publisher, Editor, and Managing Editor. Publisher: Steve Quirk, 4662 Slater Road, Eagan, MN 55122-2362; Editor: Joseph Rydholm, 4662 Slater Road, Eagan, MN 55122-2362. Managing Editor: Not Applicable; 10. Owner: Quirk Enterprises, Inc., 4662 Slater Road, Eagan, MN 55122-2362; Stockholders: John P. Quirk, 6798 Redwood Ave. NW, South Haven, MN 55328, James T. Quirk, 4662 Slater Road, Eagan, MN 55122-2362, Daniel M. Quirk, 4662 Slater Rd., Eagan, MN 55122-2362, Stephen R. Quirk, 4662 Slater Rd., Eagan, MN 55122-2362, Ann M. Quirk, 4662 Slater Road, Eagan, MN 55122-2362. Teresa K. Tweed, 16932 Hubbard Trail, Lakeville, MN 55044 11. Known Bondholders, Mortgagees, and Other Security Holders Owning 1 Percent or More of Total Amount of Bonds, Mortgages or Other Securities: None. 12. For Completion by Nonprofit Organizations Authorized to Mail at Special Rates: Not Applicable. 13. Publication Name: Quirk's Marketing Research Review 14. Issue Date for Circulation Data Below: September 2016. 15. Extent and Nature of Circulation: Average No. Copies Each Issue During Preceding 12 Months: A. Total No. Copies (Net Press Run): 13,896. B1. Paid/ Requested Mail Subscriptions Stated on Form 3541: 8,854. B2. Copies Requested by Employers for Distribution to Employees by Name or Position Stated on PS Form 3541: None. B3. Sales Through Dealers and Carriers, Street Vendors, Counter Sales, and Other Paid or Requested Distribution Outside the USPS: None. B4. Requested Copies Distributed by Other Mail Classes Through the USPS: None. C. Total Paid and/or Requested Circulation: 8,854. D. Nonrequested Distribution (By Mail and Outside the Mail). D1. Nonrequested Copies Stated on Form 3541: 4,648. D2. Nonrequested Copies Distributed Through the USPS by Other Classes of Mail: None. D3. Nonrequested Copies Distributed Outside the Mail: None. D4. Nonrequested Copies Distributed Outside the Mail: None E. Total Nonrequested Distribution: 4,648. F. Total Distribution: 13,502. G. Total Copies Not Distributed: 394. H. Total: 13,896. I. Percent Paid and/or Requested Circulation: 65.6% Actual No. Copies of Single Issue Published Nearest to Filing Date. A. 13,446; B1. 8,831; B2. None; B3. None; B4. None; C. 8,531; D1. 4,473; D2. None; D3. None; D4. None; E. 4,473; F. 13,004; G. 442; H. 13,446; I. Percent Paid and/or Requested Circulation: 65.6%. I certify that the statements made by me above are correct and complete: Steve Quirk, Publisher.

INDEX OF ADVERTISERS

This issue of Quirk's is made possible by our valued advertisers. Their ongoing support – along with that of the other companies and organizations that market themselves on our Web site, e-newsletter and related outlets – helps us bring you Quirk's and all of its associated resources. When you contact the organizations listed below, let them know you saw their ad in Quirk's!

Quirk's Marketing Research Review, (ISSN 08937451) is mailed monthly by Quirk Enterprises Inc., 4662 Slater Road, Eagan, MN 55122. Mailing address: P.O. Box 22268, St. Paul, MN 55122. Tel.: 651-379-6200; Fax: 651-379-6205; E-mail: info@quirks.com; Web address: www.quirks.com. Periodicals postage paid at St. Paul, MN and additional mailing offices.

Subscription Information: U.S. annual rate (12 issues) $70; Canada and Mexico rate $120 (U.S. funds); international rate $120 (U.S. funds). U.S. single-copy price $10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change.

POSTMASTER: Please send change of address to Quirk's Marketing Research Review, P.O. Box 22268, St. Paul, MN 55122.

10 minutes with...

Cindy Dumlao
Sensory Manager, Wrigley

"My job has allowed me to have thousands of conversations with consumers and travel all over the world, while keeping my scientific and statistical hat on. The world is my laboratory."

Read the full interview at quirks.com/articles/2016/20161022.aspx.

How did you first become interested in consumer research?
As a junior in college majoring in chemistry at Loyola University Chicago, I thought chemistry graduates only worked in the lab. That summer, I had a job at a major personal care company in Chicago. I worked in the Product Integrity Lab and spent so much time doing titrations, more so than my college lab work, that I knew then I did not want to be a lab chemist. It just wasn't for me – I liked interacting with people too much, which is limited when you work in the lab. You can't talk to machines. Some people loved it, I didn't! During that summer, I met many chemistry graduates who worked in the consumer side of the business and loved what they were doing. I formed great connections, and that networking opportunity turned into a passion for consumers.

Twenty-plus years later, I am still in it. I've held roles in clinical, consumer, sensory, claims and market research in various CPGs, and now foods. My job has allowed me to have thousands of conversations with consumers and travel all over the world, while keeping my scientific and statistical hat on. The world is my laboratory. Listening, observing and being in-the-moment with consumers is such an adrenaline rush. There's never a dull moment talking with consumers – you just never know what you're going to get! I've learned so much and there's still so much more to learn.

What is the biggest challenge in working at a company with a legacy as rich as Mars/Wrigley's?
As part of Mars, all Wrigley Associates like myself are guided by The Five Principles. As a consumer researcher, I bring to life our quality principle, "The consumer is our boss, quality is our work and value for money is our goal." The "consumer is our boss" truly resonates in what I do every day. We depend completely on consumers for our success and we tirelessly seek to understand their needs. I help build lifelong relationships from one generation to another through our products and brands and continue to be relevant to changing cultures and lifestyles for the future. This is the heart of my consumer-centricity.

Describe your preferred method when conducting interviews with consumers.
I love one-on-one conversations with consumers. This can happen anywhere: at home, a central location, the market or anywhere in the world. I don't think I can ever shop personally without talking to someone in the aisle and asking about their purchase or why they are pondering in front of the humungous selection for a category. I sometimes even buy one of our products for a customer. When you have an intimate conversation with consumers, it's a richer conversation and interaction when you give your consumer 120 percent of your attention. Nothing excites me more than when I am in the consumer's home turf – where she feels she is safe and in control telling me what excites, delights and surprises her about products she loves. Because along with these moments come opportunities. A great researcher is always listening for that – just when you think there is nothing else to do with your product, voila! A new aha! A new insight inspires you. This is what research is all about after all – it's a discovery.