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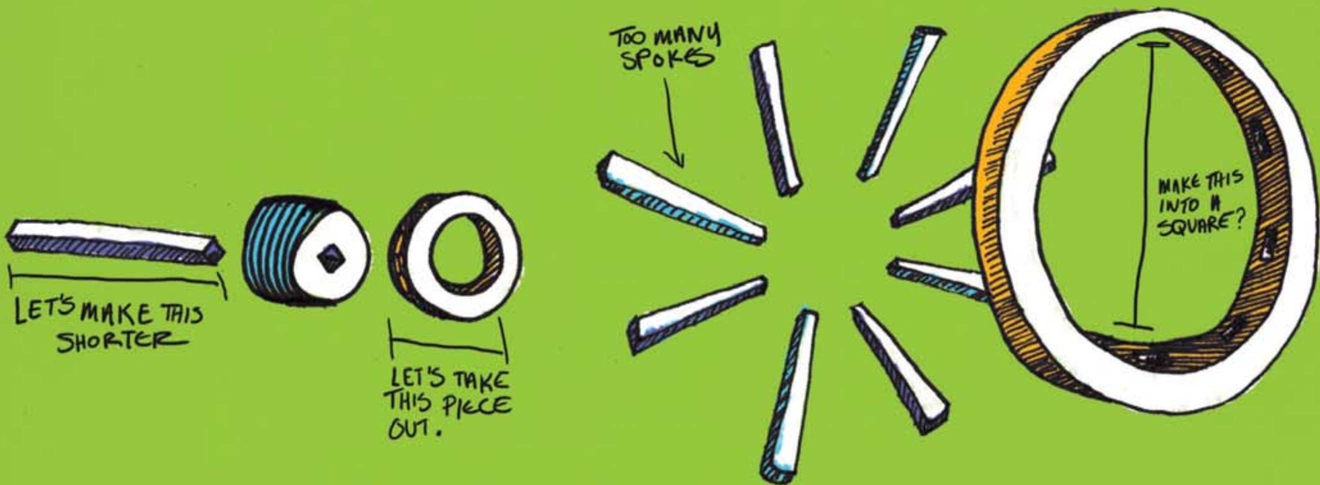

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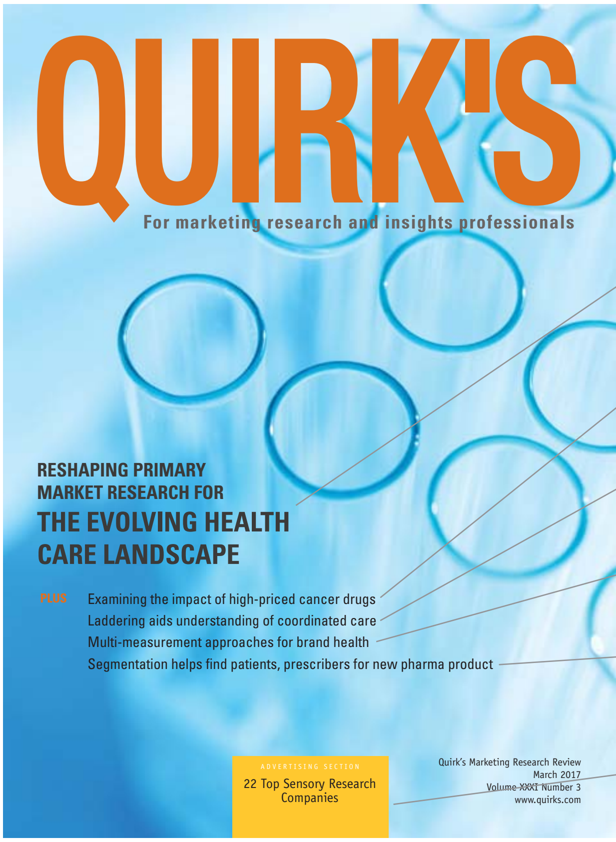

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••• political research

2016 election set ad-spend record

According to a report from Borrell Associates, The Final Analysis: Political Advertising in 2016, a record $9.8 billion was spent on national, state and local campaigns. TV got the largest share, digital media got more than expected (mostly due to social media) and 2017 is forecast to see $5.8 billion spent on political ads. 2016's political ad spend increase was 4.6 percent above the 2012 presidential election. Broadcast TV lost ground, from a 57.9 percent share of all political advertising in 2012 to a 44.7 percent share in 2016. Digital media spending, though, increased nearly eightfold, going from a 1.7 percent share in 2012 to a 14.4 percent share in 2016.

Political Advertising In Previous Two Election Cycles

Media	2016 Election Cycle	2012 Election Cycle
All media	$9.8 billion	$9.4 billion
Broadcast TV	44.7%	57.9%
Cable	13.0%	9.5%
Radio	6.3%	8.6%
Newspaper	6.7%	7.2%
Telemarketing	6.2%	6.4%
Out of Home	3.5%	4.0%
Direct mail	3.1%	3.0%
Magazines	1.4%	1.7%
Digital	14.4%	1.7%

Source: Borrell Associates, January 2017

quirks.com/articles/2017/20170301.aspx

••• health care research

Docs looking for work-life balance

A survey of physicians about their resolutions, goals and challenges for 2017 by researcher Toluna, Wilton, Conn., shows that of those who reported making New Year's resolutions, 87 percent ranked "achieving work-life balance" as their most or second-most important resolution, while 69 percent ranked "staying current with technology" and 58 percent ranked "taking advantage of more leadership and training opportunities" as their most or second-most important resolution. A top concern mentioned in the survey findings was adapting to any changes made by President Donald Trump, especially to the Affordable Care Act. Eighty-three percent of the physicians surveyed said they believe the Affordable Care Act should be completely replaced. Of those that believe it should be replaced, 35 percent said it should be replaced with a federally-funded program that provides health care for all Americans and 48 percent said it should be replaced with something other than a federally-funded program. Eleven percent said there should be no changes and 6 percent were undecided, thought there should be a few minor changes or had other ideas.

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By Joseph Rydholm, Quirk's Editor

Is 2017 the year of midorexia?

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Joe Rydholm can be reached at joe@quirks.com

I try to stay on top of what's going on in the world but in all of my reading of Web sites and magazines and blogs I had never come across the term midorexia. It's a word – largely pejorative, from what I can tell – for middle-aged and older people, most often women, who try to act or appear younger than their years by wearing clothes that are too tight or not age-appropriate or just generally engaging in activities that others deem outside of their current life stage.

The word popped up as I was perusing Euromonitor's report Top 10 Global Consumer Trends for 2017 under an entry on the trend Euromonitor calls "Aging - A changing narrative: Transforming what it means to be older."

The report, which you can download at http://bit.ly/2jg8bJI (registration required), draws from a variety of media stories and Euromonitor's own research to flesh out the 10 trends in a loose, conversational style. As with a lot of trend-related pieces, there isn't too much focus on next steps to take but its 50 pages give you a good overview and could serve as an idea-starter for those in a variety of industries.

A few that stuck out to me:

Extraordinary: Expanding the mass to accommodate needs of a larger consumer base

While much of the section on this trend focused on how everyone from clothing firms to aircraft makers is reacting to consumers' expanding waistlines, one interesting note touched on "healthwear," an apparel niche that adapts the techniques and trends of fashion and applies them to the challenges created by illness and disability. The term was coined by Maura Horton, CEO of MagnaReady, whose shirts with magnetic closures were inspired by the challenges of her husband's Parkinson's disease. U.S. shirt-maker PVH has worked with Horton to incorporate her technology into its Van Heusen dress shirts, the report says.

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Post-purchase: Beyond fulfilling to predicting

In 2017, the report states, shoppers will be paying more attention to their post-purchase experience, increasingly an important part of the value offer of a product or service that will shape their view of the business. "[B]rand willingness to address post-purchase queries and complaints will influence whether a consumer recommends or criticizes it to fellow consumers and considers a repeat purchase,"the report says.

Privacy and security: Personal safety and the allure of home and mobile cocooning

This one struck a chord with me, as, if the early weeks of the Trump administration are any indication, bellicose rhetoric and the potential for conflict are on the rise and the general mood of many segments of the population is one of nervous uncertainty. Therefore it seems only natural that consumers might turn to other aspects of their lives to regain some control. "Goods and services – anything from smart home tech to insurance, organic food to travel upgrades and investment in education – which help consumers feel they can buy back control as pilots rather than passengers will hold a strong appeal."

Wellness as a status symbol: Looking wellness-ready and the rise of boutique health

Perhaps an analog to midorexia, this one is also ripe for derision. "The spectacle of those willing to throw money at their quest for spiritual improvement is widespread enough to provide an easy target for humor, as are the frequent consumer Instagram posts of retreat experiences, expressing wellness by clichéd images of fitness-wear and toned bodies posing against scenic backdrops. At a time when consuming 'stuff,' once an indicator of wealth, is now taking a backseat, the lack of things – of excess fat, of wayward thoughts even – now defines aspiration and is at the heart of the consumer interest in wellness."

••• advice for researchers

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Can advanced techniques like conjoint analysis and max-diff work on mobile screens?

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So far the answer is yes. We've seen several independent research papers over the past few years looking at choice-based conjoint and max-diff (best/worst) scaling surveys. The authors investigated potential differences in various areas including time to take the survey, the resulting utility models and self-reported metrics such as readability and enjoyment. Small differences exist between laptop/desktop users and tablet/smartphone users, but generally the results show these powerful techniques hold up very well on smaller screens (and in a few cases respondents on smaller screens had better outcomes).

We suppose that most people willing to take a survey on their mobile device would have a good level of familiarity and comfort when it comes to navigating complex Web sites, including making purchases. Pew Research estimates 77 percent of Americans over the age of 18 own a smartphone and others estimate 30-40 percent or more of global e-commerce is done from a mobile device nowadays, so people are getting a lot of practice.

> Not all exercises transfer to a small screen, such as store shelf displays or conjoint designs with a very large number of attributes.

Not all exercises transfer to a small screen, such as store shelf displays or conjoint designs with a very large number of attributes. Several of the authors discuss small changes and some simplification approaches to make an exercise much friendlier for small screens. You still need to be diligent about testing your survey and getting some feedback from survey respondents but we're optimistic that these approaches still provide robust and good-quality models for predicting market choices.

Carl D. Marci, M.D.
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IN FOCUS

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

// Survey Monitor

••• country focus: china

Nielsen study gets the dirt on cleaning in China

Men pitching in to help

Results from a Nielsen survey examining home cleaning and laundry habits show that one-third of Chinese respondents (33 percent) say they clean every day and nearly half of the respondents (46 percent) say they do laundry daily.

While 44 percent of Chinese respondents say the female head of household does the majority of cleaning, that's not to say men aren't sharing in the load: 33 percent people say house cleaning is a shared responsibility between the two heads of the household, which is higher than global average of 28 percent, and 14 percent of respondents say men do the majority of cleaning. Responsibility for product purchasing largely mirrors who is doing the cleaning – with even greater female influence. More than half of Chinese respondents (55 percent) say the female head of household buys the majority of cleaning products, nearly one-quarter (24 percent) say it's a shared responsibility and slightly fewer (17 percent) say the male head of household is responsible for the majority of purchasing.

"The perception that home care is only women's work is inaccurate," says Tina Ding, vice president of Nielsen China. "The female head of household remains a key stakeholder in the cleaning process in many homes but as more men play an active role in housework, marketing strategies need to reflect a more balanced approach – from product innovations to marketing messages. This will require a deeper understanding of how each gender approaches the task of cleaning and where gaps in current offerings may exist."

Modern retailers come out on top in every region as the self-reported place to purchase cleaning products. A majority (83 percent) of Chinese respondents say they purchased household cleaning products from a large in-store retail chain (such as a mass merchandiser or hypermarket) in the past 12 months. Still, e-commerce is an important purchasing channel for cleaning products in China. Forty-three percent of respondents in China say they have purchased household-cleaning supplies from an online retailer in the past 12 months, far higher than the global average of 23 percent.

"Distribution is the top driver of product trial, and it is positively correlated with product volume," says Ding. "Presently, e-commerce accounts for only a small share of household products sales but it is growing rapidly, particularly in Asia. As increasing economic prosperity in the region drives sales of household cleaners, establishing and maintaining strong relationships with both brick-and- mortar and pure-play online retailers will be important for capitalizing on this growth."

Respondents in Asia-Pacific are also inclined to shop at traditional stores. Four in 10 respondents in the region say they've purchased cleaning products from a small, family-owned shop

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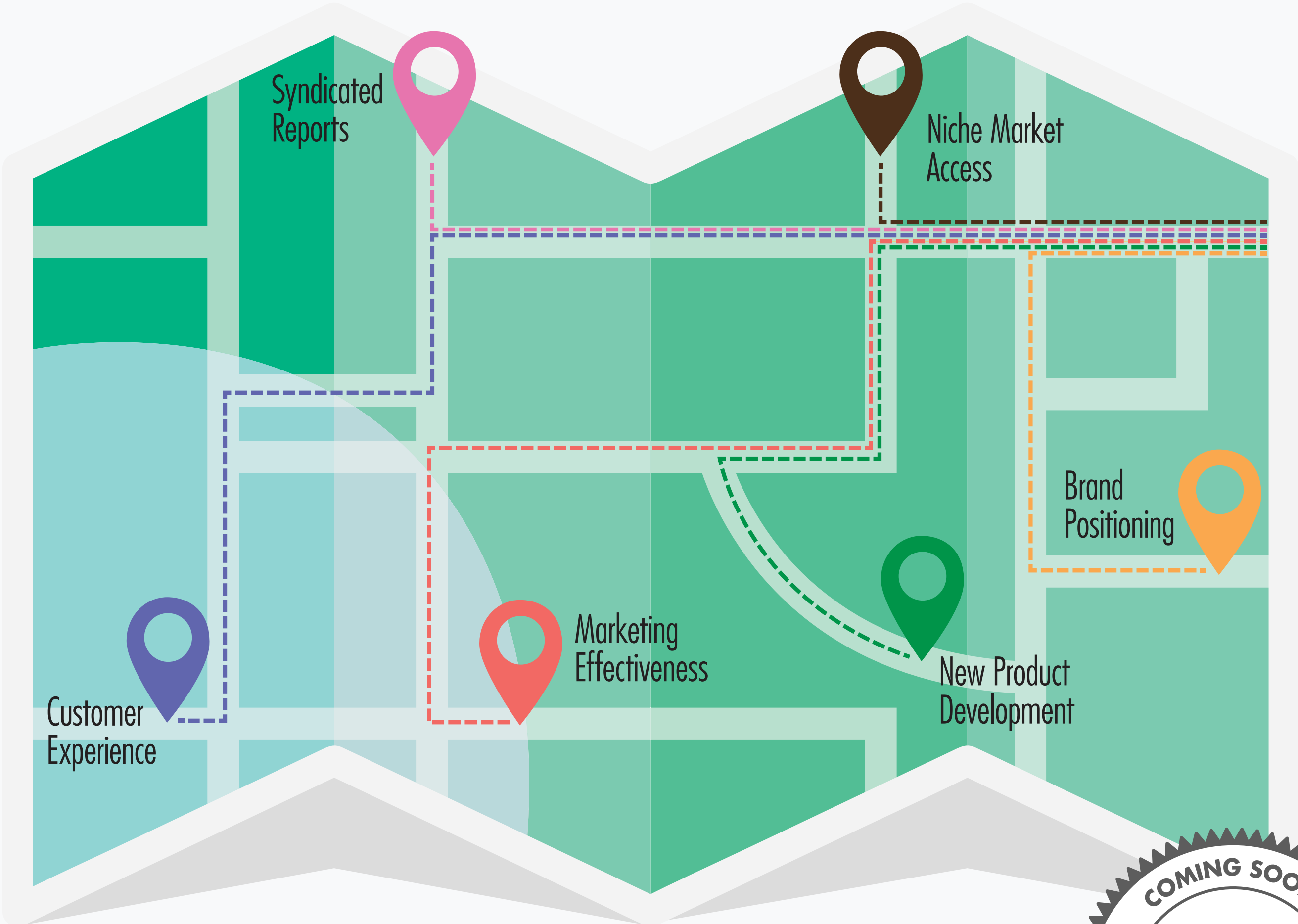

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It should come as no surprise that efficiency and value top the list of most important attributes in a home cleaning product. Fifty-eight percent of Chinese respondents say performance (it cleans well) is very important when selecting a household cleaning product. In addition, 41 percent say good price/value is very important. Nearly four in 10 (38 percent) Chinese respondents say a trusted brand name is very important, while slightly fewer (36 percent) say a previous experience is very important when selecting household-cleaning products is very important.

And secondary attributes should not be overlooked. Nearly three in 10 respondents say packaging that is easy to use or store (28 percent) or that comes in a size that fits their family's needs (25 percent) is very important. In addition, some consumers are leaning green. Thirty-one percent of Chinese respondents say organic/all-natural ingredients are very important, and 23 percent say environmentally friendly/sustainable packaging is very important.

Chinese consumers purchasing laundry detergent also list performance as a top attribute when making a choice – 70 percent say they seek detergents that are best at getting stains out. More than half (57 percent) say they look for high-efficiency products (i.e., products that require less water) and 46 percent say they're looking for detergents they can use on multiple types of items. Over one-third (40 percent) of Chinese respondents say they seek detergents that don't contain harsh chemicals and slightly fewer (35 percent) want environmentally-friendly detergents.

••• employment research

HR leaders fret over burnout

Too many barriers affecting retention

The biggest threat to building an engaged workforce in 2017 is employee burnout. The newest study in the Employee Engagement Series, conducted by Kronos Incorporated, a Chelmsford, Mass., provider of workplace management tools and services, and Future Workplace, found 95 percent of human resource leaders admit employee burnout is sabotaging workforce retention, yet there is no obvious solution on the horizon.

In this national survey, 614 HR leaders – including chief human resource officers, vice presidents of HR, HR directors and HR managers from organizations with 100 to 2,500+ employees – provided a candid look at how burnout drives turnover, what causes it and why there is no easy solution despite 87 percent of respondents calling improved retention a high/critical priority.

Organizations "churn and burn" talent, making it tough to build an engaged workforce. According to the survey, nearly half of HR leaders (46 percent) say employee burnout is responsible for up to half (20 to 50 percent, specifically) of their annual workforce turnover. Almost 10 percent blame employee burnout for causing more than 50 percent of workforce turnover each year. Though burnout touches organizations of all sizes, larger organizations seem to suffer more. One in five HR leaders at organizations with 100 to 500 employees cited burnout as the cause of 10 percent or less of their turnover while 15 percent of HR leaders at organizations larger than 2,500 employees say burnout causes 50 percent or more of annual turnover.

Too much work and too little pay are problematic but many issues fueling burnout are in HR's control. Unfair compensation (41 percent), unreasonable workload (32 percent) and too much overtime/after-hours work (32 percent) are the top three contributors to burnout, per the study. Still, HR leaders also identified key burnout factors falling under talent management, employee development and leadership that should be in their control, including poor management (30 percent), employees seeing no clear connection of their role to corporate strategy (29 percent) and a negative workplace culture (26 percent). Insufficient technology for employees to do their jobs was identified by 20 percent of HR leaders as another primary cause of burnout. This is more prevalent at larger organizations with more than 2,500 employees, where it was cited by 27 percent of respondents.

There are significant barriers preventing HR from improving retention in 2017. Despite 87 percent of HR leaders calling improved retention a critical or high priority over the next five years, one-fifth (20 percent) said there are too many competing priorities to focus on fixing the issue in 2017. Outdated HR technology is another problem: nearly one out of every five HR leaders (19 percent) reported their current tech as being too manual, i.e., lacking automation of repetitive administrative tasks – detracting from their ability to act strategically to fix big problems. The C-suite must step up their commitment, too, according to HR leaders in the study, who say lack of executive support (14 percent) and a lack of organizational vision (13 percent) are additional obstacles to improving retention in 2017.

Despite well-documented costs of employee turnover, organizations are more apt to invest in recruiting new employees as opposed to retaining existing talent. The survey found that 97 percent of HR leaders are planning to increase their investment in recruiting technology by the year 2020, including nearly a quarter (22 percent) who anticipate a 30 to 50 percent increase in such spending. However, budget was continually cited by HR leaders as a deterrent to programs that would benefit retention of existing talent. This includes 16 percent who say a lack of budget is the primary obstacle to improving employee retention in the next 12 months; 15 percent who say a lack of funding is the biggest challenge to improving employee engagement; and 27 percent who say funding is the biggest hurdle to implementing new HR-related technology, such as tools that would reduce manual or administrative work to act more strategically.

••• b2b research

Commerce systems holding B2B firms back

Need to keep pace with the digital-savvy

As reported by Helen Leggatt of BizReports, CloudCraze's 2017 B2B Digital Commerce Imperative Study shows that many B2B organizations rely on outdated and inflexible commerce systems, leaving a significant gap between customer expectations and customer experiences. In fact, in the survey of 200 B2B and B2C businesses with an online presence, Chicago-based commerce platform CloudCraze found that nearly two-thirds (65 percent) were running on commerce platforms that are more than two years old, "demonstrating a lag in the implementation of sophisticated digital offerings," the report says.

This lag means that, while 55 percent of business buyers expect mobile access to a seller's commerce platform, and 52 percent expect convenient payment processes, most B2B commerce systems don't provide these offerings. As a result, businesses have missed out on revenue. Seventy percent of businesses say they have lost a business deal because of an ordering-specific pain point and 31 percent say they've missed out on at least $2 million in sales.

More than one-quarter (27 percent) of B2B organizations plan to spend at least $2 million in the next year on improvements to their commerce systems. The survey found industries are at different stages of digital commerce maturity and each face a unique set of challenges based on the needs of their target buyers.

Manufacturers. Overall, the manufacturing industry is accommodating the complex needs of its customers better than any other B2B industry. The study found that 54 percent of manufacturers say their customers find their online experience very satisfactory, compared to 44 percent across industries.

However, many manufacturers are still operating with inflexible, on-premise systems, causing inefficiencies when it comes to servicing their buyers across sales channels, especially with low-volume customers. As a result, manufacturers are more likely to experience cost inefficiencies than other industries (45 percent versus 37 percent).

Eighty percent of manufacturers have lost a business deal due to customer pain points compared to 37 percent on average across industries. This illustrates the detrimental impact that poor digital experiences can have on a business's bottom line.

Health care and life sciences.

B2B organizations in the health care and life sciences industry are least likely to say buyers require mobile access, quick access to sales representatives, advanced pricing or customized pricing of any industry. The highly complex nature of its products and customer relationships have been a major contributor to the slow development of digital capabilities and expectations.

Health care businesses are most likely to experience pain points when it comes to platform speed-to-market, often caused by the combination of outdated, inflexible systems and the industry's strict regulatory procedures. Cloud-based solutions can expedite deployment and support sales teams working with complex customer needs, while meeting the complex regulatory and security requirements of this industry.

Software and media technology. While software and media technology sellers ranked themselves as average to above average in addressing their buyers' needs, the survey found that they were the least able to accommodate complex pricing and ordering requirements of their customers across industries, attributable to the variable, complex nature of subscription-based models. To solve for this, businesses of this field need commerce systems that can handle the industry's diverse revenue models and can support flexible marketing, promotions and ongoing changes to those supporting models.

B2B in retail. Many retailers in B2B double as B2C stores, such as Staples or Grainger, and therefore allocate much of their resources to support development of consumer-facing commerce platforms. As a result, their platforms are ahead of the curve in offering customer-centric commerce features, such as mobile payment options. But these companies often don't support the complex needs of B2B transactions. The study found the B2B retail industry faces challenges providing a seamless, omnichannel customer experience (44 percent) and is most likely to report customers struggle with order replenishment capabilities (39 percent). As a result, retailers in B2B are turning to SaaS solutions to increase the flexibility of their commerce offerings.

"With digital-savvy consumers fast becoming the professionals in B2B buyer decision-making roles, every B2B industry must be optimized for digital commerce in the next five years," says Chris Dalton, CEO at CloudCraze. "B2B companies are smart to get ahead of this digital transformation and prepare for the fully-digital world that awaits them."

••• shopper insights

Gen Z still likes to shop in stores

Young in age, old in values

Despite expectations that the first "digitally native" generation would want to shop online, a new study released by IBM and the National Retail Federation found that almost all members of Generation Z prefer to shop in brick-and-mortar stores. With the global Gen Z population set to reach 2.6 billion by 2020, retailers need to create more interactive engagement around their brands to serve the "always on," mobile-focused, high-spending demographic, according to the study.

"Generation Z expects technology to be intuitive, relevant and engaging – their last great experience is their new expectation," says IBM General Manager of Global Consumer Industries Steve Laughlin. "This presents a significant challenge for retailers and brands to create a personalized, interactive experience with the latest digital advances or risk falling behind. This kind of innovation is not linear or a one-time project – it is a new way of thinking, operating and behaving."

"Just as Millennials overtook Gen X, there's another big buying group retailers need to plan for, and it's even larger: Generation Z," says Matthew Shay, NRF president and CEO. "They appreciate the hands-on experience of shopping in a store. With technology constantly evolving but some shopping habits remaining the same, retailers need to be agile enough to serve both needs. Retailers are constantly focused on experimenting with new innovations both online and in-store to remain relevant to evolving consumer demand."

The Uniquely Gen Z study conducted by the IBM Institute for Business Value is based on findings from more than 15,000 consumers aged 13-21 from 16 countries. Born after the mid-1990s till early 2000s, Generation Z is the first digitally native group to grow up not knowing a world before cellular phones, smartphones and other digital devices. But the study found that 67 percent of Generation Z shop in a brick-and-mortar store most of the time, with another 31 percent shopping in-store sometimes, indicating that 98 percent of Gen Z shop in store.

The new generation is important to retailers because it has access to $44 billion in buying power, with 75 percent saying they spend more than half of the money that is available to them each month, according to the study. And the generation is demanding: The study found 52 percent of Gen Z consumers will transfer loyalty from one brand to another if the brand's quality is not up to par. They care the most about retailers getting the basics right, with 66 percent saying product quality and availability are the most important factors when choosing one brand over another; 65 percent focus on value.

The study found 74 percent of respondents spend their free time online, with 25 percent online five hours or more each day. The degree to which in-store sales are influenced by digital is inevitable in today's shopping journey – and continues to grow. The study discovered a number of insights into Gen Z's digital habits and preferences brands can leverage to reach them:

Seventy-three percent of Gen Z use their phones primarily to text and chat socially with family and friends but members are willing to extend their conversations to brand relationships. Thirty-six percent would create digital content for a brand, 42 percent would participate in an online game for a campaign and 43 percent would participate in a product review.

They have no patience for hard-to-use technology and demand a seamless mobile/digital experience: 62 percent will not use apps or Web sites that are difficult to navigate and 60 percent will not use apps or websites that are slow to load.

Gen Z knows personal information is valuable to retailers, so members want to know how brands are using it and how the information will be protected. Less than 30 percent are willing to share health and wellness, location, personal life or payment information; 61 percent would feel better sharing personal information if they knew it would be securely stored and protected.

The study found that Generation Z consumers like to engage with brands online, especially with those that create an interactive environment where customers can shape their own experience. As retailers develop and engage in such practices, they will be able to capture Gen Z ideas for new products, services, engagement and shopping experiences, the study said. The generation is known to be brand champions both online and offline, especially when brands acknowledge and value their opinions.

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••• hispanic research

More acculturation, more pets?

Hispanic pet ownership on the rise

Over the past decade, the number of Hispanics in the U.S. with pets in their homes skyrocketed from 11 million to 20 million as the pet ownership rate among Latinos grew from 40 percent to 55 percent between 2007 and 2016, according to market research firm Packaged Facts in the report Hispanics as Pet Market Consumers.

This exceptional growth rate is due not only to the rapid growth of the Hispanic population but also to the accelerating degree of Hispanic acculturation. Hispanics as Pet Market Consumers reveals that pet ownership has become a marker of increasing acculturation within the Latino population. A substantial majority (64 percent) of highly acculturated Latinos (defined as those who are U.S.-born with at least one parent born in the United States) own pets. The 48 percent pet ownership rate among foreign-born, Spanish-dominant Latinos pales in comparison.

As a result, the profile of Latino pet owners is increasingly skewed in the direction of Hispanics who are relatively more acculturated. Highly-acculturated Latinos account for just 27 percent of adult Latinos but fully 32 percent of Latino pet owners. Foreign-born, Spanish-dominant Hispanics represent 35 percent of all Latino adult consumers but just 31 percent of Latino pet owners. In all, highly-acculturated Hispanics and foreign-born Latinos who are bilingual or English-dominant constitute 65 percent of the adult Hispanic population but 69 percent of Hispanic pet owners.

As more acculturated Hispanics continue to make up a larger and larger share of a rapidly expanding Hispanic population, the number of Hispanic pet owners will continue to grow exponentially. Packaged Facts projects that between 2016 and 2021 Latinos will account for half of the growth in the pet owner population. The growth trajectory of Hispanic pet ownership means that pet industry marketers have no choice but to focus not only on what differentiates Latino pet owners from other pet owners but also from other Hispanics.

To begin, when selecting a pet, Hispanics make different choices. Compared to other pet owners, Latino pet owners are much less likely to bring a cat into their home (29 percent vs. 45 percent), are more likely to have a dog (79 percent vs. 75 percent) and, even more distinctively, are more likely to have pets other than cats or dogs. Compared to non-Hispanic pet owners, Hispanics are more than three times as likely (16 percent vs. 5 percent) to own birds. They make up 15 percent of the pet owner population but 34 percent of all bird owners. Latino pet owners also are somewhat more likely to favor reptiles (5 percent vs. 3 percent) or fish (11 percent vs. 10 percent).

Packaged Facts' National Pet Owner Survey data reveal other distinguishing characteristics of Latino pet owners. For example, Hispanics are more likely than non-Hispanics to want to have a pet they can take with them more places (50 percent vs. 42 percent), a preference no doubt related to the fact that Latino dog owners are more likely to choose toy or very small dogs weighing under eight pounds (16 percent vs. 10 percent). Hispanic pet owners are much more likely to use social media to let their friends and family in on their lives with their pets (50 percent vs. 40 percent) and to believe that "having a pet is a good way to get ready for having a family" (58 percent vs. 45 percent).

Marketers reaching out to Latino pet owners need to understand the implications of the tilt of the population of Latino pet owners in the direction of more acculturated Latinos. Hispanic pet owners are less connected than other Latinos to key aspects of Hispanic culture. They are less likely to turn to Spanish-language media, depend on Spanish-language labels or be influenced by Spanish-language advertising.

Marketers also should acknowledge the special importance of Millennials within the Latino pet owner population because they represent 43 percent of Latino pet owners compared to just 30 percent of non-Hispanic pet owners. On average, Millennial Hispanic pet owners are even further along the acculturation spectrum that Hispanic pet owners on average. They are much more likely than older Hispanic pet owners to have been born in the United States (66 percent vs. 39 percent) and to speak predominantly English at home (50 percent vs. 37 percent). As a result, they are even less likely to watch Spanish-language television (42 percent vs 58 percent) or to be influenced by Spanish-language ads (19 percent vs. 28 percent).

As shoppers, Millennial Hispanic pet owners reflect the habits of their generation. For example, they are more likely than older Latino pet owners or non-Hispanic pet owners of any age to use a smartphone app for shopping. They also are more likely to buy products they see advertised on their cellphones.

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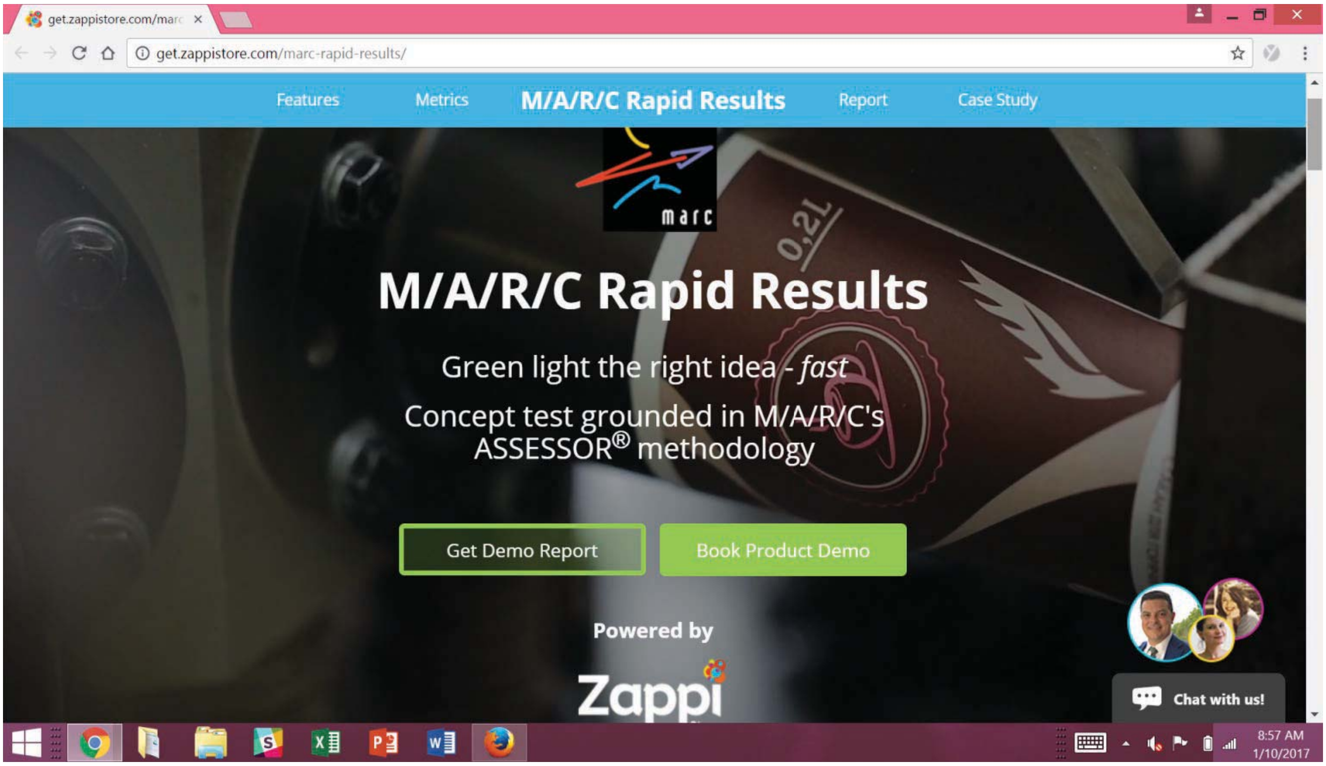

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Product and Service Update

••• mobile research

DataSpring adds Korea coverage

PanelNow mobile app

Japan-based panel and survey software firm dataSpring has added Korea to its list of mobile panels with the launch of PanelNow, a new mobile survey app. Researchers can run surveys in a mobile-optimized platform with features such as in-app survey notification and device-blocking capability. Panelists can answer surveys on-the-go and in-the-moment on their smartphone or tablet at a time and place convenient for them. New users need to complete a short profiling survey before they can participate in research projects and earn points via the mobile app or the PanelNow Web site. The mobile research panel in Korea currently has over 1,000 active panelists. More are set to launch within the year. The PanelNow app is available for Android and iOS phones and tablets.

www.d8aspring.com

••• food research

Cargill opens food innovation centers

Locations in Minneapolis, Shanghai

Cargill, Minneapolis, opened two food innovation centers in November and December which focus on improving and investing in the future of food to meet shifting consumer expectations. The Minneapolis Research and Development Center in Plymouth, Minn., is a 100,000-square-foot facility that includes molecular biology labs, analytical and materials research laboratories, test kitchens and a pilot production plant. The center is home to about 200 scientists working on projects from improving food safety to developing new food ingredients that meet consumer expectations for simple, nutritious options. The Cargill ONE Innovation Center in Shanghai is a 22,000-square-foot facility with a sensory lab, demonstration kitchen and capabilities for dairy, beverage, bakery, convenience food and culinary applications. More than 25 scientists on-site will create innovative menu solutions that combine consumer insights, trend forecasts and culinary expertise to serve as the incubator for future tastes. The location will also be used as a platform to educate the public on nutrition and food safety. These two new centers join regional food research and innovation centers in Campinas, Brazil; Vilvoorde, Belgium; Beijing; and Wichita, Kan.

quirks.com/articles/2017/20170304.aspx

••• behavioral research

Ogilvy Center for Behavioral Science launches

Will partner with Kantar

Marketing communications company Ogilvy & Mather, New York, has launched the Ogilvy Center for Behavioral Science, which will focus on establishing a new system to define how audiences think, feel and behave to improve marketing and communications effectiveness. Christopher Graves assumes the role of president and founder of the new organization. As part of its work, the center will tap a fast-growing body of research to help clients identify the levers most likely to shift behaviors and change attitudes. To do this, Graves and the team have created a new navigation tool called AMOS, named in honor of one of the founding fathers of behavioral economics, Amos Tversky. Additionally, the center will partner with other organizations such as research firm Kantar to create new cognitive insights and with WPP Government to help in large-scale population behavior change for quality of life improvement.

www.ogilvy.com

••• mobile research

New mobile app from Confirmit

Works online or offline

Oslo, Norway-based software firm Confirmit has launched Confirmit AskMe, a mobile survey app that allows participants to respond to surveys online or offline. The app can be used for any type of feedback program and by any respondent, including those with limited connectivity or those who need to complete surveys over a period of time. Multimedia feedback can be captured and stored offline and synchronized when connectivity improves. As well as aiming to increase response rates through flexible access, organizations can brand the Confirmit AskMe app to suit their own look and feel. In addition, no extra

design or integration work is required as Confirmit AskMe is designed to work with organizations' existing Confirmit Horizons environment. Confirmit AskMe is available now on Android and iOS and can be distributed at no cost by Confirmit customers on App Store or Google Play.
www.confirmit.com

••• Briefly

■ Chicago-based researcher IRI has launched its next-generation targeting solution, IRI Verified Audiences, which uses frequent-shopper program loyalty data to enable targeted campaigns based on actual purchase behavior.
www.iriworldwide.com

■ Marketing software company Bridg, Los Angeles, has launched a new marketing platform that allows brick-and-mortar restaurants and retailers to identify and connect with individual customers online. The platform enables restaurant and retail marketers to identify individual customers, segment their buying patterns and deliver personalized advertising messages across social media, Web and mobile channels.
www.bridg.com

■ Canada-based Provalis Research has released QDA Miner Lite 2.0, an upgraded version of the qualitative analysis freeware QDA Miner Lite, developed to include some of the new features added to the full version of QDA Miner.
provalisresearch.com

■ Retail technology company Cloverleaf, New York, has launched shelfPoint, a shelf solution with built-in emotional artificial intelligence capabilities that allows brands and retailers to capture customer engagement and sentiment data at the moment of purchase decision.
cloverleaf.info

■ Chicago-based company Civis Analytics has released Civis Research, a research application that helps companies better understand their brand health through the use of surveys. The application offers customized templates and the ability to filter survey audiences by demographics and geography. The company says it is starting with templates for brand health and will add more in the future.
www.civisanalytics.com

■ Leveraging its weekly, store-level enabled point-of-sale data from U.S. brands and retailers, Port Washington, N.Y., information company The NPD Group has introduced its Price and Promotion Management Service. The subscription-based, category-wide service is a suite of scenario planning and simulation tools designed to help manufacturers and retailers make price and promotion decisions with more speed and accuracy.
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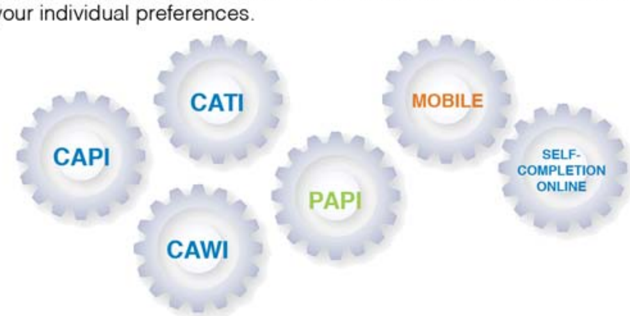

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NPS is not the only number to rely on

| By Paul Abel

snapshot

The author argues that a high Net Promoter Score isn't always a sign of success.

Over the past 10+ years, companies have appeared to be insecure. "Would you recommend us?" they constantly ask their customers. This trend has spread so far that cities, universities and even the Boy Scouts of America are asking this question. Following its introduction to the business world in 2003, it rose quickly to popularity, somewhat like Justin Bieber. However, just like "The Biebs," its usefulness has been questioned, nobody seems to stop talking about it and yet deep down something does seem to be of value.

This question, of course, is used to calculate a Net Promoter Score (NPS). The three-sentence version of the NPS story is:

- Not long after the *Harvard Business Review* publishes Fred Reichheld's article "The one number you need to grow" in 2003 the concept becomes a smash hit.

- The "one number" is calculated by taking the percent of people "highly likely," minus the percent "unlikely" to recommend the company (yielding a Net Promoter Score).

- The claim is that by using this one simple question to manage its business a company can grow more quickly.

NPS has become a discussion in the boardroom, is being broadly used to measure and manage success and some companies even tie executive and employee compensation to achieving specific NPS targets.

The problem is, the claim that this score is correlated with growth is actually false. If anything, the companies that use this tool appear to grow more slowly.

As Justin Bieber might say, let's take this one step at a time:

- What is NPS? The "one number" is captured by asking "How likely is it that you would recommend [Company X] to a friend or colleague on a scale of 0 to 10?" The resulting data are then aggregated into Promoters (scores of 9 and 10), Detractors (scores of 0-6) and Passives (scores of 7 and 8). By taking the percent of Promoters minus the percent of Detractors, voilà, you have the Net Promoter Score.

- Why did it become so popular? It seems logical; advocacy correlating with revenue makes sense. It seems credible; it was published in the *Harvard Business Review* and purported to be based on data. It is easy to monitor; it only requires one question to be asked and a single value can be easily communicated and used to manage performance.

- How do we know it doesn't work? To test this claim, we conducted an experiment. We started with the companies that Bain and Company (a strong proponent of this tool) reports are using this metric. We selected all of those companies that are listed in the S&P 500. We

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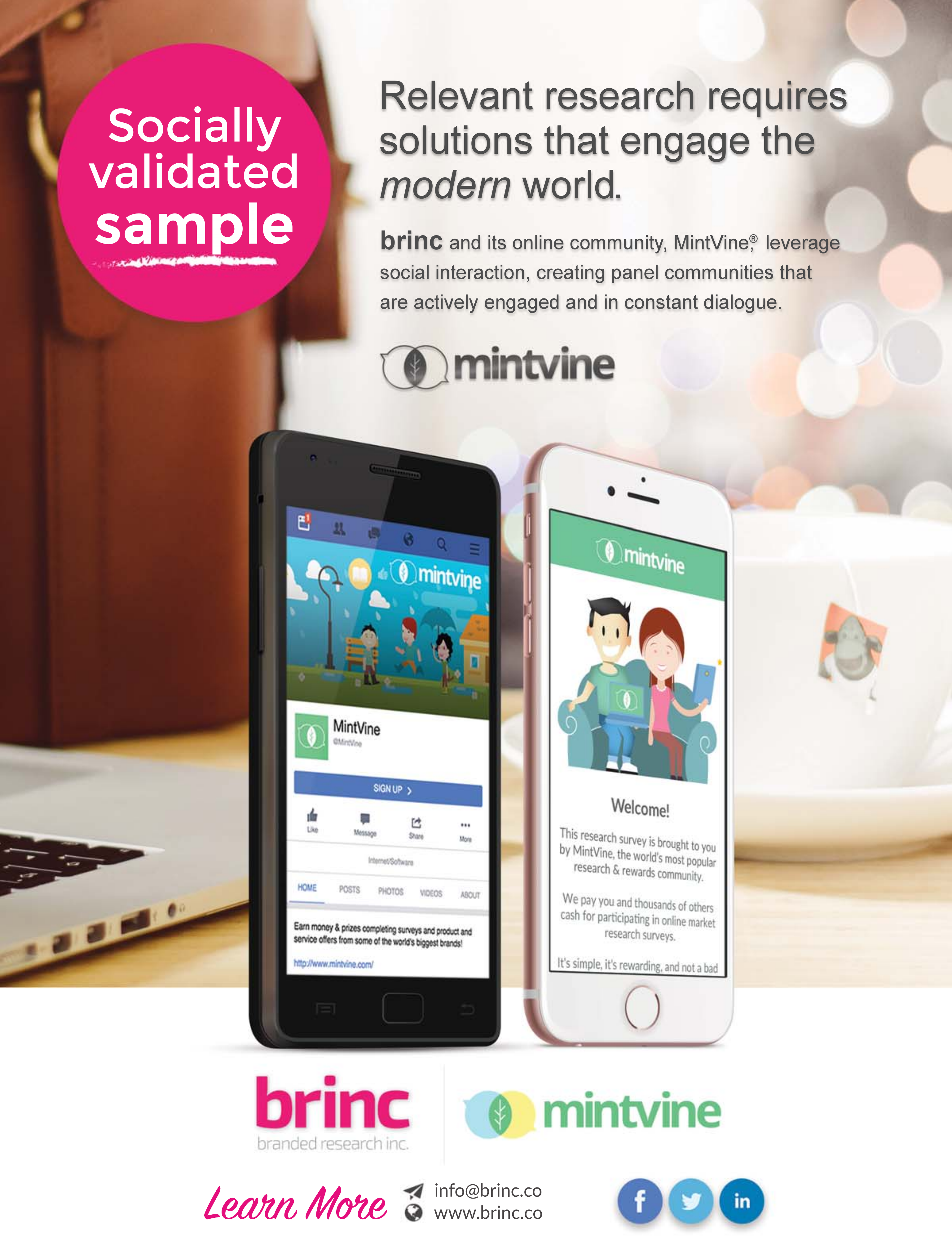
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Figure 1

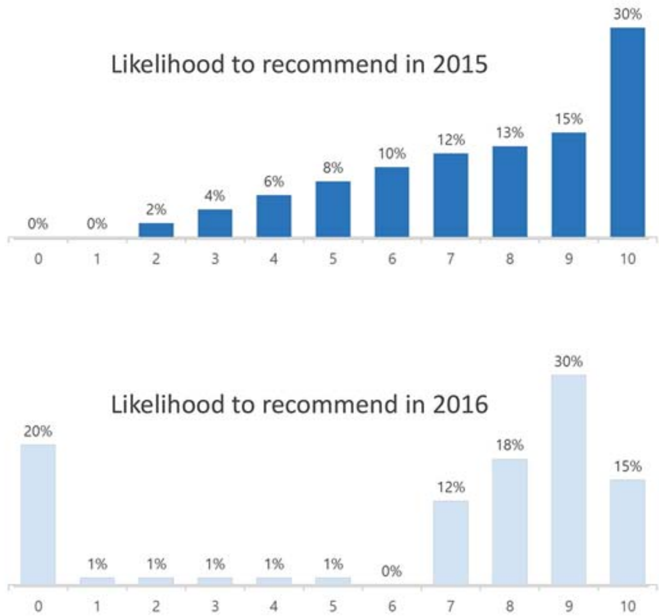

Figure 2

then calculated the growth rate of all of those companies and compared those results with an equal number of companies randomly pulled from the S&P 500 (nearly 100 companies in total). What we found is opposite to what you'd expect: 62 percent of the companies reported to use the Net Promoter Score showed positive growth (2012 to 2015 CAGR). However, 68 percent of companies selected at random from the S&P 500 showed a positive growth over the same time period.

- Even so, tracking NPS scores can't be bad, right? Wrong. It turns out that an increase in the percent of Promoters versus Detractors may suggest a company is improving, when in fact it is not. At the risk of delving too deep into the numbers, consider just one example (Figures 1 and 2). The company's NPS increased by five points (from 15 to 20) between 2015 and 2016. This gain might be considered a success. However, looking at the data, the 15-point NPS score reflects a better position with customers than when the company increased to a 20-point NPS score.

- What, then, is the real value of NPS? From a business perspective, if designed well, implemented effectively and interpreted appropriately, NPS can have merits: it can provide a measure of customer sentiment; it can encourage an external customer focus; and it can stimulate conversations.

Similar to Justin Bieber, NPS is not for everyone. For businesses, even if you are a fan and have adopted a process to measure NPS, looking deeper is vital. Asking one "magic" question may seem enticing and can give one point of reference. However linking employee compensation to an NPS is ill-advised. When listening to customers, rely on a variety of questions and focus on attributes that customers find most important in selecting the product or service you offer; "recommendation" is likely to be part of it but unlikely to be the only part.

Paul Abel is a managing partner in the Portland, Ore., office of Blue Research. He can be reached at paul.abel@blue-research.com.

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health care research

Working toward a healthy prognosis

Reshaping primary marketing research for the evolving health care landscape

| By Amy Marta

snapshot

Amy Marta outlines how marketing research could transform in the coming years in response to the ever-changing health care industry.

quirks.com/articles/2017/20170306.aspx

The United States health care industry is complex and evolving, the result of consolidation, conflicting stakeholder interests and reforms in health care and regulatory policy. It's no secret, either. If one thing is constant in the pharmaceutical and biosciences industry, it's that nothing stays the same for long.

What isn't nearly as well-understood, however, is how these factors will transform a key driver of competitive advantage in the industry: primary market research. As the health care decision-making system becomes even more complex, market researchers who serve pharmaceutical clients must evolve as well.

The biggest challenge for marketing researchers will be to understand and explain the transition of traditional health care stakeholders into more advanced, strategic "organized customers." Customers increasingly exert significant institutional influence over the selection, use and perceived value of medical products and services. Organized customers make strategic decisions regarding trade-offs that reflect the organization's perspectives, priorities and interests. Despite common objectives, these customers comprise a diverse group of organizations that include providers such as integrated health networks, payers, pathway groups, pharmacy benefit managers and distributors.

Together, these forces represent a disruptive change. The mind-set that health care's organized customers are monolithic and homogenous (and thus relatively easy to understand and influence) is quite false. While decision-making remains largely the domain of physicians, these physicians are increasingly influenced by new stakeholders, including cost-conscious administrators, department heads, payers and review committees.

As a result, primary marketing researchers must rethink their traditional methodologies, develop new skills and prepare to co-create with customers to produce actionable insights. In health care, the days of the lone researcher sitting behind the glass – talking to respondents through

third parties and conducting blinded studies – may be about to change.

Let's start with a quick look at the environmental changes that drive these transformations.

New realities

In pharmaceuticals and biotech, new realities have taken hold over the last decade as market and governmental forces motivate industry consolidation to cut costs, manage risk and strengthen negotiation power to secure the most attractive reimbursement rates.

Traditionally, health care analysts viewed the industry as three separate entities: doctors, consumers and payers. But in today's web of influencers, they must be thought of in a much more connected fashion.

From these changes, three trends emerge to influence how to conduct market research:

1. Physicians are losing autonomy in decision-making. Prescribing physicians have traditionally been the primary decision makers for health care system, with supporting stakeholders such as nurses, patients, payers and pharmacists only occasionally considered. Those were happy days for successful pharmaceutical sales reps who prioritized the most lucrative doctors, scheduled regular office visits and distributed marketing collateral and tchotchkes to influence their buying.

Today, in most cases, physicians remain the stars of the show but with diluted autonomy as they increasingly affiliate with health care organizations that must meet corporate objectives, such as to maximize efficiencies and deliver value. Inside these organizations, the physician may be required to consult – and sometimes yield to – powerful stakeholders, including administrators, pharmacy directors or department heads.

Outside of the institutions, payers have effectively placed controls and interventions, such as pathways that further affect the autonomy of physician prescribing behavior.

2. The rise of the organized customer. Organized customers cover a wide range of health care entities. These include integrated delivery networks (IDNs) or coordinated groups of hospitals, doctors, insurers and other health care providers who offer a continuum of care under a professional managerial business structure. IDNs are the most common type of organized customer and growing in number. Banner Health (Phoenix), Henry Ford Health Systems (Detroit), Kaiser Permanente (Oakland, Calif.) and Intermountain Health (Salt Lake City) are all IDNs. Another form of organized customer are accountable care organizations, which are motivated by the Affordable Care Act (and financial incentives) to provide coordinated care to certain populations, including Medicare patients and the chronically ill. Organized customers also include integrated payer-provider networks, clinically integrated networks and distributors, including group purchasing organizations, to name a few.

Because of their size and control, organized customers are becoming increasingly influential relative to physicians. One of our clients told us about a major payer in the chronic-disease realm that removed Advair from its formulary for cost reasons, even though the drug had 70 percent market share. The power to influence critical decisions, such as which medications a doctor can prescribe, is real, and it's one reason that, in a 2015 study by The Physicians Foundation, 69 percent of the 20,000 U.S. physicians surveyed expressed concerns about clinical autonomy and the ability to make the best decisions for their patients.

3. Every organized customer is unique. For example, the same organized customer in Atlanta will operate very differently than the one in Seattle due to the local payer influence and the local employer demands. Making matters even more complicated, every organized customer differs in terms of where power and influence reside. When you understand one organized customer, you can't assume that you understand others. A pharmacy director might be a significant decision influencer in one

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system, while a clinical director or even an administrative committee might be a heavy hitter in another.

This concentration and complexity make organized customers difficult entities to comprehend. The range of possible stakeholders inside them widens the number of potential decision-making processes that market researchers must understand. Some organized customer decision-making is more controlling and centralized, while others focus on financials and the budget.

At the end of the day, what really matters to pharmaceutical manufacturers is what drives decisions and prioritization within those customers. With that knowledge provided by marketing research, a manufacturer can package its story and messages to resonate with stakeholders and decision makers in that organized customer group.

Pressure to change

These new health care realities will create pressure on primary researchers to change their methods. In many ways, the traditional approach won't be up for the job.

The heterogeneity of organized customers and their local markets, for example, makes conducting primary research incrementally more difficult than merely talking to individual practicing physicians and drawing insights to apply to all doctors or systems. The breadth of roles, organizations and locations represented by organized customers often leads to overly generalized observations about the industry that aren't as useful. Meanwhile, the heterogeneity causes more specific observations to be easily refutable by local market counter examples.

Market researchers must adapt to this new ecosystem and veer away from some traditional practices. In fact, we believe that primary research in health care must change in fundamental ways.

Here are some ideas on how the research environment might transform over the coming years.

Marketing, the marketing research function's customer, will go local. Said differently, pharmaceutical companies will move away from single national campaigns and more toward campaigns customized to local markets. It's much like TV advertising for national campaigns and separate local-market campaigns. These differ in the subtlety of their messages as well as how they buy TV time to reach the target market (that is, how they differ in the value story and the target audience). Fundamentally this will have an impact on research professionals and require them to develop greater intimacy with specific markets and organized customers.

To better understand organized customers, different types of secondary data sources must be integrated and analyzed to develop key insights. These data types include usage volume, affiliations, customer profile data, payer/plan information and organizational structure data. Tying these together, insights professionals can peer into organizations to better understand how they make decisions as well as the prescribing behaviors and number of in-network specialists in the network – information that will give manufacturers' sales reps critical insights before they even walk through the door. Are reps visiting an account that uses and loves the product or is this account putting up barriers? Does this account have effective prescribing controls in place? Secondary data sources will help answer those questions.

Quantitative research will no longer be as dominant a methodology. This will be one major result of the rise of the organized customer and the decline in importance of the solo physician as an independent decision maker.

Since every organized customer functions uniquely, research will more often need to take place within an individual organized customer rather than across all organized customers. In traditional studies, researchers would talk to physicians to understand their motivations, attitudes and behaviors. Need to talk to 150 cardiologists? No problem. You'd survey 150 cardiologists. But today, with decision-making more concentrated, the universe to study shrinks considerably. If your business question depends on researching pharmacy directors who are key to formulary decisions, there might be only one or two inside each organized customer being studied – nowhere near as many physicians.

This means that attainable sample

sizes will be smaller and, therefore, the idea of doing a lot of quantitative research will become less realistic. There will need to be more qualitative work to generate directional quantitative information. Primary marketing researchers will have to structure qualitative in a way that allows them to generate quantitative data that they have confidence in.

For example, we often use a conjoint analysis to quantify and understand choice among physicians. In an organized customer setting, using conjoint analyses won't be as effective because they don't model group decision-making. It's more likely that we'll need to generate conjoint-like outputs from focus groups and individual structured conversations and employ more qualitative/quantitative techniques. While this method will never be as robust, we'll have to adapt to the working conditions and limitations as presented.

Another way of looking at this is the fact that there will just be less access to respondents. If there are a small number of institutions and a small number of stakeholders who matter within these institutions, at some point there won't be enough capacity for these individuals to do marketing research. There will need to be value beyond the honoraria to make participating in research worthwhile – or insanely high honoraria.

With fewer primary sources to draw upon, marketing researchers will need to replicate the health care system in a research setting using cross-functional respondent groups. If a researcher tries to learn how a variety of stakeholders make a decision – say, whether a product should be put on formulary – that process may have to be simulated. Like a mock jury, the researcher will assemble a pharmacy director, a medical director, a senior practicing physician and a member of the finance team to work through the decision given the range of variables considered by the organized customer's process. The researcher would engage them in discussion months before a panel considers the decision and hope to guide the identification of a strategy and tactics to influence that outcome.

Co-creation will be more commonplace. This is a decidedly different approach than in the past, which essentially involved rounds of blinded research, developing a solution in isolation, then retesting it with another large group of respondents. Increasingly, companies may need to co-create with their customers in group workshops and across a series of one-on-one meetings. Participants will help create answers by working together to form a consensus. Marketing research is commonly designed to help marketers develop programs to be used with customers. Since all organized customers are unique, engaging them directly to develop relatable programs is expected to be more common. Researchers, and potentially designers, will facilitate conversations with customers and work together to shape solutions.

Answer three vital questions

In the end, a combination of analytics, customer insights and direct engagement with organized customers will

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provide the most comprehensive insights and answer three vital questions:

1. Which organized customers matter most and should be prioritized? (Which are the largest? Which are most successful at controlling prescribing?)

2. What are their behaviors and processes? (How do they operate?)

3. What matters most to them? (Get inside their business philosophy and learn how they make trade-offs and prioritize.)

These new health care market dynamics are likely not that big of a stretch to envision given the environment, but are immediate realities. What about a few years down the road? Will the traditional primary marketing research model still have a place? Will it survive? We have some hypotheses about how and why research will start to evolve.

A new kind of research

Looking to the not-too-distant future, we see the emergence of a new kind of marketing research, one with a break from time-tested approaches. Some traditional practitioners may not agree with what we have to say about this but we think the debate is worthwhile.

Both our ideas center around using field intelligence to better understand the customer – a necessity as traditional primary research becomes less feasible. Field-based research is not something pharmaceutical companies consistently do today – although, interestingly, all manufacturers have representatives in the field talking to customers. However, the primary job of these reps is to sell; they are not rewarded to collect and share customer data, learnings and observations with headquarters.

To really understand the organized customer, the model of how we capture customer information must evolve. We need more on-the-ground involvement from field reps to collect information that's relevant for insight purposes. There must be different tools in place and new administrative or organizational structures to support this approach. Capabilities must be built to support this type of shift. Different industries have evolved this to some levels but the pharmaceutical industry has not.

Ultimately, leveraging sales reps may not be the optimal model for everyone; they are responsible for sales, after all. If the power of the organized customer continues to evolve, we see marketing research personnel, themselves, moving into the field and becoming part of a team whose mission is solely to understand the local customer. It's not about selling. They will collect insight and information and translate for those who determine high-level strategy for the brand and customer.

More innovative

Given existing conditions and future trends in health care, primary market researchers must develop new capabilities and be more innovative in their approaches. Customer insights must rethink how to support "where to play" and "how to win" questions to help clients understand the interplay between corporate strategy and individual motivations.

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1. Primary/secondary research integration. This is about exhausting all secondary data and sources in the public domain to fully understand and appreciate the organized customer. Essentially, a dossier for each customer should be built that profiles them from every dimension. Existing secondary sources will only go so far before there will need to be an aspect of primary interaction to clarify aspects of decision-making and influence that can't be extracted from data sources. In some respects, you can think of this as a private investigator to understand anything and everything about a target.

2. Ability to co-create directly with customers. This requires a shift in mind-set for researchers, away from the lone actor doing research in a blinded, outside-in fashion to someone leading a collaboration driven toward consensus in direct conjunction with customers. Manufacturers must develop stronger relationships with their customers to recognize value in working together directly and openly, essentially eliminating the need for traditional research. Traditional methods and techniques will still be leveraged, especially in the interest of minimizing bias. However, no longer will there be a veil of secrecy on these interactions.

3. New modes of information capture, such as field-based capture of stakeholder motivations and influences. With field reps and account managers on the hook to more systematically collect information on organized customers, this will be a different approach for most organizations. Field reps are not typically seen as a key source of customer insight and it will require tools, training and processes to accomplish successfully. The most sophisticated companies may deploy a dedicated, field-based customer insights team to cover organized customers and immerse themselves in understanding the decision making and influence networks within each organization.

Somewhat unpopular

This view may be somewhat unpopular with some veteran primary research practitioners but if you look at a typical market research plan, I bet that 75 percent is allocated toward physician-centric spending, with the rest earmarked for consumers and payers. The idea of organized customers and the influence that they have in a geographic area is not a common way that most research functions think about structuring what they do but the trends outlined here will eventually influence what they do and how they do it.

It's becoming clearer that market research isn't just evolving; it's being disrupted. If we don't recognize the impact of these forces, we are at risk of misguiding our stakeholders.

The winners that will drive research forward will be organizations that are willing to evolve and adapt to the new environment, embrace alternative techniques and reorganize their operations to take advantage – rather than be a victim – of the new dynamics that are driving health care.

Amy Marta is a principal at sales and marketing firm ZS, Evanston, Ill. She can be reached at amy.marta@zsassociates.com.

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pharmaceutical research

Enthusiast or Fence-Sitter?

Segmentation helps find patients and prescribers for new pharma product

| By Lloyd Wohlner

snapshot

Lloyd Wohlner explores a case study on using research to assess a medical product's potential.

So you have a successful product on the market and your R&D people have come up with a new, improved formulation. In most cases, your best prospects to buy the new product are the people who regularly buy the current product. But maybe there are others who might buy it who you're not currently reaching. And if there are other potential customers for the new product, how do you reach them and what do you tell them about it?

Our client has a market-leading medication and is developing a new delivery mechanism with certain clinical improvements. The firm has already identified target specialist physicians to whom it actively promotes the current brand. It asked us for help identifying the right physicians to whom to promote the new product. Some of the questions that needed answering included:

- Should the firm approach the same physicians it currently targets or

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- Where are the target physicians located?
- What is the best way to reach them?
- Are there certain patients who would be more appropriate to use the new product?

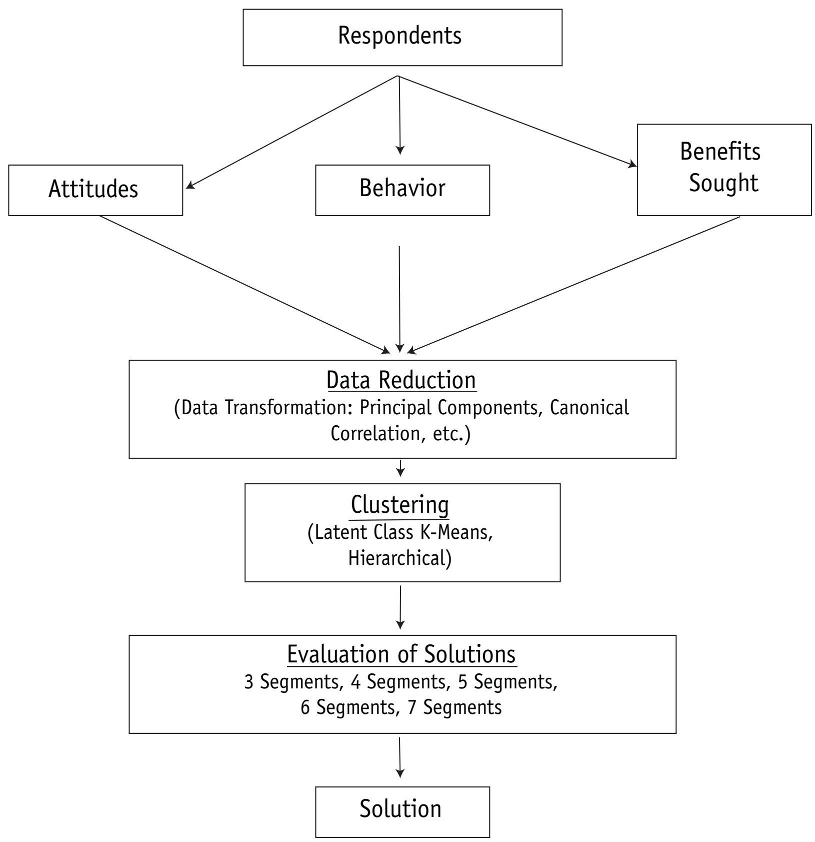
These and a host of similar questions come up as part of marketing planning for any product line extension. And one way to answer such questions is segmentation.

Segmentation is frequently used to find subsets of customers who share common product needs and identifiable characteristics. This allows the marketer to select and promote profitably to appropriate target market subsets.

We worked with our client to develop an online survey of specialists, physician assistants and nurse practitioners. The goal of the research was to identify characteristics of prescribers who would be more likely to use the new product, the types of patients they see as most appropriate for the new product and determine where these target prescribers are located and how best to reach them.

Figure 1

Segmentation Process



Obviously, we couldn't survey the entire population of prescribers in the U.S., so one key deliverable from the research was a typing tool that sales representatives could use to characterize any physician or physician extender into the more-likely or less-likely segment and then approach them appropriately.

In addition to asking the prescribers to rate themselves on various behavioral and attitude scales, our survey included our Patient Chart Capture methodology. For this portion of the survey, respondents are asked to extract information from the charts of a small number of actual recent patients. In this case for: a newly diagnosed patient; one who was recently prescribed the client's current product; and one who was recently prescribed the main competitor product.

Using this approach allows us to collect information on patient populations and treatment patterns. It generates a comprehensive dataset that depicts the sequence of therapy events from initial diagnosis to the most recent patient visit. It also collects demographic information that can be compared to treatment choices. It focuses the respondent's attention on specific patients, actual patient characteristics, actual prescribing behavior and reasons why the treatment decision was made. This helps to control for the likely overstatement of future product use that can happen when asking "What

Segment				Early Adopter Sequence Mean 5-Point Scale	Client Brand Share of Patients		Concomitant Brand Share of Patients		Percent Pts w/No Additional Subtypes	Percent Pts w/Normal Skin	Place Client Brand in Treatment Algorithm			Place Other Brand in Treatment Algorithm		
					Male	Female	Male	Female			First Line	An Option to Consider	Only if Needed	First Line	An Option to Consider	Only if Needed
Segment	Enthusiasts	Target n=70 20.1%	58% Private Ins.	2.9	31.7%	35.4%	30.9%	31.7%	19.0%	13.8%	31.4%	64.3%	4.3%	--	62.9%	37.1%
		White Space n=104 29.8%	61% Private Ins.	2.9	27.1%	33.6%	29.1%	31.7%	20.0%	16.2%	17.3%	73.1%	9.6%	1.9%	60.6%	37.5%
	Fence-Sitters	Target n=87 24.1%	61% Private Ins.	2.9	22.4%	26.1%	20.9%	24.9%	28.0%	22.3%	14.9%	71.3%	13.8%	3.4%	40.2%	56.3%
		White Space n=88 25.2%	64% Private Ins.	3	14.1%	17.2%	19.2%	20.6%	26.5%	17.8%	5.7%	79.5%	14.8%	1.1%	47.7%	51.1%

Table 1: Key differences between physician segments. Note: Significant differences (color highlights) read vertically. For example, Enthusiasts are more likely to see the client's current brand as a first-line treatment than do the Fence-Sitters; Fence-Sitters are likely to see more patients with normal skin and a simple version of the condition (that is, no additional subtypes present) than the Enthusiasts.

Segment			Mean Likelihood to Rx Product X			Mean Likelihood to Rx Product X										
			Patient Prior Treatment			Patient Age					Patient Gender		Skin Condition			
			New Patient	Other Brand Patient	Client Brand Patient	< 30	30 - 39	40 - 49	50 - 59	60+	Male	Female	Normal	Dry	Oily	Combination
Segment	Enthu-siasts	Target n=70 20.1%	7.6	6.6	7.5	7.7	7.5	7.3	7.1	6.6	7	7.4	7	7.2	7	7.4
		White Space n=104 29.8%	4.2	4.1	4.9	7.5	7	7.3	7.3	6.7	7.2	7.2	6.9	6.8	7.6	7.3
	Fence-Sitters	Target n=87 24.1%	7.2	6.9	7.4	4.5	4.4	4.5	4.2	4.2	4.3	4.4	4.2	4.1	4.4	4.6
		White Space n=88 25.2%	4.3	4.4	5.1	5.3	4.7	4.6	4.3	4.5	4.5	4.7	4.2	4.7	4.6	4.7

Table 2: Key differences between patient segments. Note: Significant differences (color highlights) read horizontally. For example, all the physicians see younger patients (age under 30) and female patients as more likely to receive Product X.

percent of your future patients will likely receive this new medication?"

Importantly from a legal standpoint, this approach retains patient anonymity so HIPAA rules regarding patient privacy are not violated.

Critical measures included

We worked closely with our client to develop the questionnaire so that critical behavioral and attitudinal measures were included. Some of the topics in the questionnaire were:

- general practice profile;
- current patient allocation across competitive products;
- agreement/disagreement with a battery of attitudinal questions on the treatment area;
- physician and (perceived) patient preference for various delivery vehicles for medication;
- perceived differences between current treatment options; and
- Patient Chart Capture information from three recent patients treated for the condition.

The Patient Chart Capture questions included: age; gender; subtype of the condition; current treatment; prior treatment; insurance type; whether current treatment was add-on or replacement; and concomitant treatments for the condition.

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Product X Typing Tool

Classification Factor	Input
Client brand share of Rx from Xponent (Range: 0 to 100)	15
Other brand 1 share of Rx from Xponent (Range: 0 to 100)	3
Percent of patients with only [regular condition], no additional subtypes (Range: 0 to 100)	1
Percent of [condition] patients with normal skin (not oily or dry) in affected area (Range: 0 to 100)	1
There are five types of vehicles to deliver topical medication to the face: cream, lotion, foam, ointment and gel. Where do your patients rank foam as desirable? (Range: 1 to 5)	4
How long after an initial [condition] visit do you typically schedule a follow-up visit? 1 = less than a month / 2 = 1-2 months / 3 = 3-4 months / 4 = 5-6 months / 5 = >6 months	5
What role does Other brand 2 play in your [condition] treatment choices? 1 = first choice / 2 = an option to consider / 3 = only if absolutely necessary	1
What role does Client brand play in your [condition] treatment choices? 1 = first choice / 2 = an option to consider / 3 = only if absolutely necessary	3

Classified into
Enthusiast

Table 3: Sales representatives enter information to the input column and the physician or physician extender is classified as either an Enthusiast or a Fence-Sitter. The representative can obtain information from company headquarters for the first two factors and get answers to the other factors from a brief discussion with the health care professional.

After reviewing a profile of the new product, the respondents were asked what they see as its potential advantages and disadvantages, their level of interest in using it and, finally, the likelihood they would consider it for each of the three specific patients they had profiled earlier in the survey.

The client provided us with its current target list of specialists and NPs/PAs; this list was matched against the field service's panel of prescribers. The survey was fielded initially to the match between current targets and the panel and later opened to the rest of the panel. In this way we could see whether there were potential prescribers of the new product not on the client's current target list. The final sample yielded a total of 349 respondents, subdivided as shown here.

	Total	Targets	Non-Targets
MD Specialists	299	146	153
NPs/PAs	50	11	39

Identify and profile good targets

The goal of this research was to identify and profile good targets to whom to promote the new product, as well as to find out which types of patients these physicians think are the best candidates to receive the product. To do this, we conducted two segmentation analyses, one on the prescribers and one on the patient profiles.

Segmentation is a multi-step process, ideally involving a number of different measures, both behavioral and attitudinal (Figure 1). Some have approached physician segmentation strictly on behavioral variables, usually the share of prescriptions for the various brands in a particular class of drugs. Unfortunately, given the influence of managed care organizations on prescribing, based on which brands the insurance companies will cover, as well as variations in how often the different sales representatives call on the physician, this sort of behavioral measure can change over time rather than define clear, identifiable and stable segments. Attitudes and desired benefits tend to change less over time, hence are more useful in segment

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identification.

Prescriber segments were identified using K-means clustering; two-, three- and four-segment solutions were evaluated on Bayesian and Akaike information criterion measures; the two-segment solution was found to best fit the data based on these criteria.

Since segmentation is both art and science, several different analyses were run, including and excluding different items from the questionnaire. Questions from the survey were put into the segmentation analysis if they seemed likely to help differentiate groups of respondents and dropped from the analysis if it turned out they did not contribute any differential value. Items that went into the final prescriber segmentation analysis include:

- share of recent patients receiving our client's current brand;
- answers to a battery of attitude questions;
- role of current brand and a key competitor in practice (e.g., first choice, an option, etc.);
- perception of patient preference for various delivery vehicles;
- level of interest in Product X based on a product profile;
- share of upcoming patients likely to receive Product X;
- likelihood to prescribe Product X for the three specific patients described in Patient Chart Capture.

Substantial number were hesitant

Based on the differences between the two segments, we labeled them as Enthusiasts and Fence-Sitters. Only a few physicians were outright rejectors of the new product but a substantial number were hesitant, both in their overall interest in using the product as well as their likelihood to use the new product for each of the three patients they brought to the survey.

Several factors clearly differentiate the Enthusiasts from the Fence-Sitters; the key differences are yellow-highlighted in Table 1. Note that differences read vertically in the table.

- Enthusiasts are more likely found among "white space" professionals not on the client's current target list.
- Enthusiasts have a higher share of their patients on the client's current product; this is important since the target list is based primarily on prescribing volume, not share.
- Enthusiasts also have a higher share of their patients on another brand that is sometimes used concomitantly in treating this condition.
- Enthusiasts are more likely to have patients with complex versions of the condition, patients with more than one subtype of the condition present at the same time.
- Enthusiasts are more likely to consider the client's current brand as a first-line treatment and are less likely to consider one of the competitor products as an "only if needed" treatment option.

First, note that there are substantial numbers of Enthusiasts among

"white space" prescribers, those not currently on the client's target list.

The survey asked the ZIP code of the respondent's practice. From this we were able to determine who practices in major cities, the suburbs and smaller cities and towns across the country. Given a finite number of sales representatives, and the extensive geography of some of the sales territories, it's not surprising many physicians and physician extenders practice in places the sales representative can't readily reach. Picture a physician in Scotts Bluff, Neb., 400 miles away from Omaha and 200 miles from Denver; it's highly unlikely a pharmaceutical rep will easily get there. But many Enthusiasts practice in areas like this.

How do you reach these potential prescribers in a cost-effective way? We also asked all the respondents how they like to obtain information about new products. The Enthusiasts, as it turns out, are more willing than the Fence-Sitters to obtain information via e-detailing and mail from the company medical department. Here is a ready-made way reach the Enthusiasts who practice in somewhat remote areas.

Draw a picture

After the respondents had reviewed the Product X profile, they were shown the Patient Chart Capture information they had provided and were asked for each of their own patients how likely they would have used Product X for that patient had it been available the last time they made a treatment decision for the patient. This allowed us to understand the types of patients the respondents themselves see as good or bad candidates. This helps rein in respondents' tendency to acquiesce and be overly agreeable in their answers.

We were able to draw a picture of what these professionals see as better candidates for Product X, allowing our client to develop sales material highlighting just that type of patient and helping improve the likelihood that prescribers would have a solid idea in mind of a patient and be willing to offer Product X when they see patients like this.

The ideal patient for Product X is a younger woman with combination skin; she could be equally a newly-diagnosed patient, one on the client's current brand or, slightly less likely, a patient currently using the main competitor brand.

Identifying who is and is not a likely user for Product X among a sample of 350 prescribers is nice but it isn't any help to the sales representatives who are calling on medical offices around the country. Therefore TVG developed a typing tool, using a small number of items from the segmentation analysis. The sales reps can enter information on the physician or physician-extender they are calling on and determine whether they are talking to a potential Enthusiast or Fence-Sitter. Knowing this, they can adjust their sales message accordingly and either focus on the benefits of the new product or reinforce the beliefs in the current brand.

The typing tool is a simple Excel file; the sales rep enters some information they obtain ahead of time from headquarters on current prescribing in the therapeutic area and gathers additional information from the potential prescriber (usually based on prior discussions about the client's current brand). The Excel file then indicates whether this person is more likely an Enthusiast or a Fence-Sitter.

Successfully introduced

Along with research on positioning, message platform and creative concepts, our client has successfully introduced its new product to U.S. physicians. Using the results of the segmentation research, the launch material profiles the ideal patient candidate. In addition, there are messages developed to reach out through other media to potential prescribers who aren't reached by the sales force. We wish our client well as it grows its new product.

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Placing an undue burden

Rising oncology medication costs and the impact on patients

| By Joel Schindler

snapshot

The author looks at new research that highlights the societal implications of high-priced cancer drugs.

The costs associated with life-saving or life-extending oncology medication are becoming unsustainable. The need for solutions to the rising costs of medication has reached a critical point for patients and their families. The rise in costs shows no obvious signs of reversing course and few, if any, solutions are being discussed. The goal to provide the best patient care possible is getting lost as patients struggle to afford treatment.

According to ASCO, newly approved cancer drugs cost an average of $10,000 per month, with some therapies topping $30,000 per month. Prices on older drugs are also rising. Insurance may cover some of the costs associated with medication and treatment, and manufacturers offer some discounts, but the dramatic increase in costs is becoming too great a burden for patients and their families to bear. Patients have shifted their decision-making away from which treatments are best for their health to which treatments they can afford – if they can afford treatment at all. Highlighting the significance of this shift is a quote from Dr. Syed Yousuf Zafar at Duke's Cancer Institute: "As oncologists, we spend a great deal of time talking to patients about the long-term physical side effects of treatment," he said. "We could do a better job of talking about the potential for financial harm." (Reuters, Jan. 2016)

In the Reuters article, entitled "Debt, bankruptcy are rewards for cancer survivors," the authors highlighted the financial toll of higher costs. The increase in medication costs causes financial hardship for patients and families, a dramatic increase in bankruptcy rates and a fundamental shifting of their lifestyles in order to survive. Bankruptcy rates among those with a history of cancer are said to be more than two times higher than those without a history of cancer.

There are both medical and societal implications to the issue of rising oncology medication costs. A cancer diagnosis is devastating enough but now patients face the uncertainty of whether they can even afford treatment and, if so, what they and their family will have to sacrifice in order to do so. Much has recently been written that highlights specific examples

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Figure 1

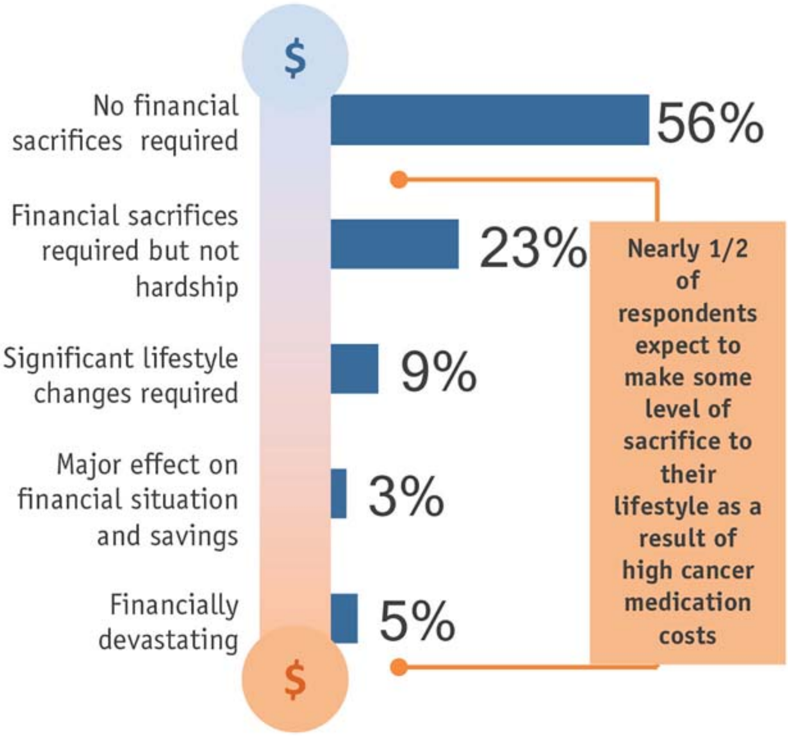
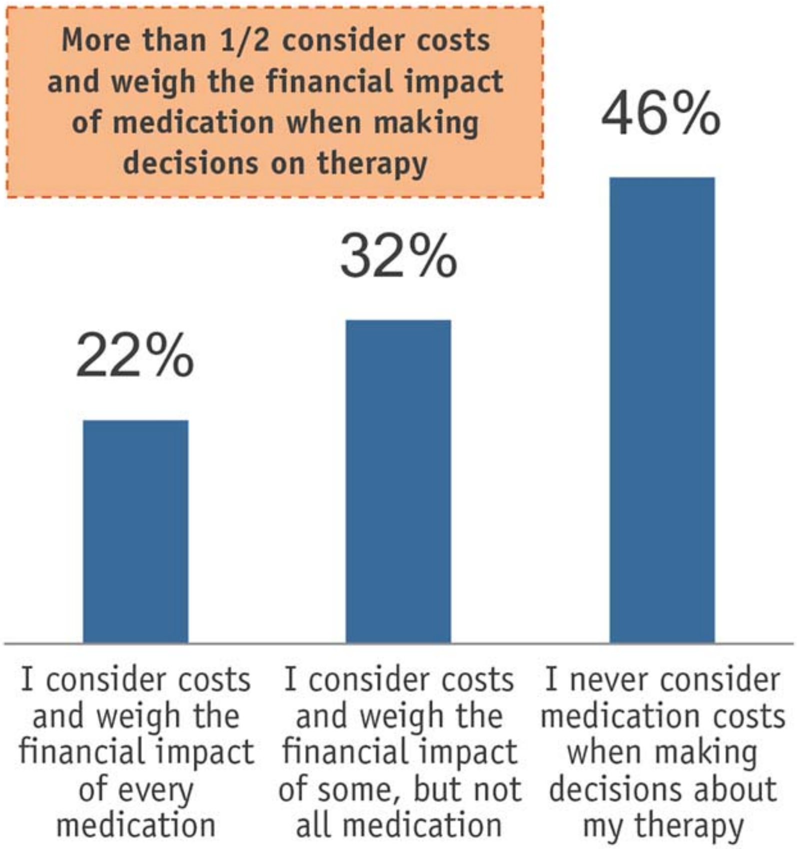


Figure 2



of patients and their families being faced with difficult choices associated with the financial implications of choosing various cancer therapies.

Patients aren't the only ones speaking out about the issue. In fact, a group of more than 100 oncologists went public with their concerns and a call for action. Shared in a *Wall Street Journal* article, the group of addressed the very issue of trade-offs associated with higher costs.

Patients "have to make difficult choices between spending their incomes [and liquidating assets] on potentially lifesaving therapies or forgoing treatment to provide for family necessities," the doctors wrote in *Mayo Clinic Proceedings*, a monthly peer-reviewed journal, as cited in the *Wall Street Journal* article. As a result, about 10 percent to 20 percent of cancer patients don't take their treatment as prescribed, the doctors say. (WSJ, 2015)

The nature of hardships

MarketVision Research has an ongoing research initiative that intends to highlight and explore key issues in the health care and pharmaceutical space. We are interested in understanding – in more detail than what is available in the general media – the extent to which the cost of cancer medications is directly impacting patients and their families.

In order to address this question, we have begun working directly with cancer patients and their families to understand the nature of hardships they face as a result of rising costs of oncology medication; the trade-offs and sacrifices they are making and how these impact decisions they make about their treatment and quality of care.

MarketVision spoke with more than 200 cancer patients, selected from the Research Now patient panel and screened on a variety of issues including cancer types, timing and severity of diagnosis and length of treatment. Patients were asked their opinion on a variety of topics relating to the issue of oncology medication and manageability of expenses associated with treatment.

This research shows nearly one of every two cancer patients have had to make lifestyle changes as a result of medication costs (Figure 1). (MarketVision Research, 2015) The

Figure 3

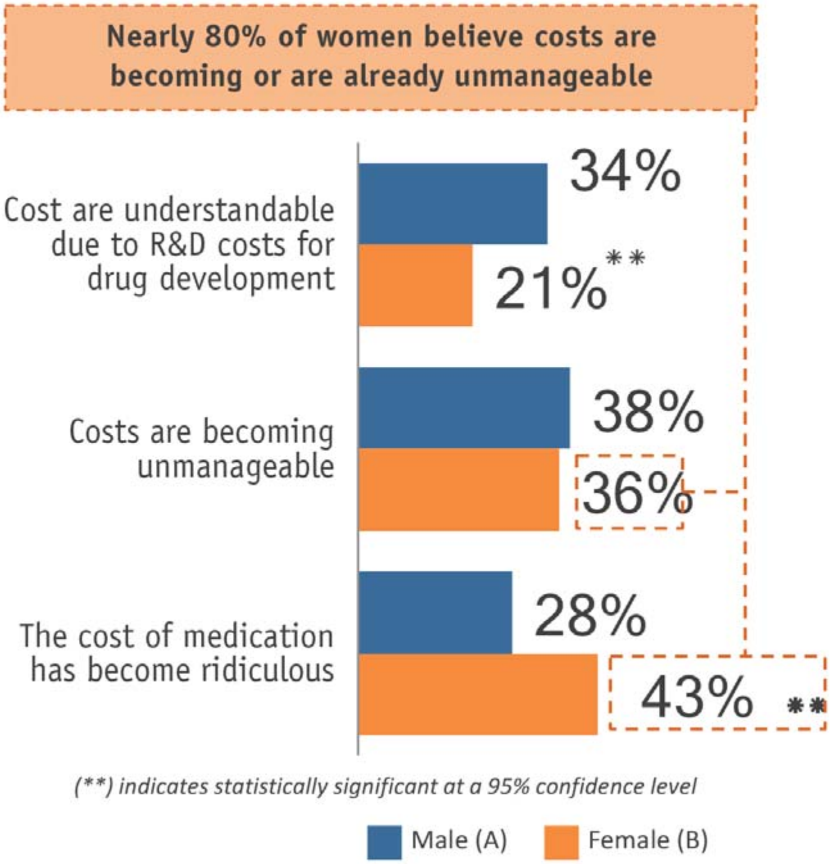
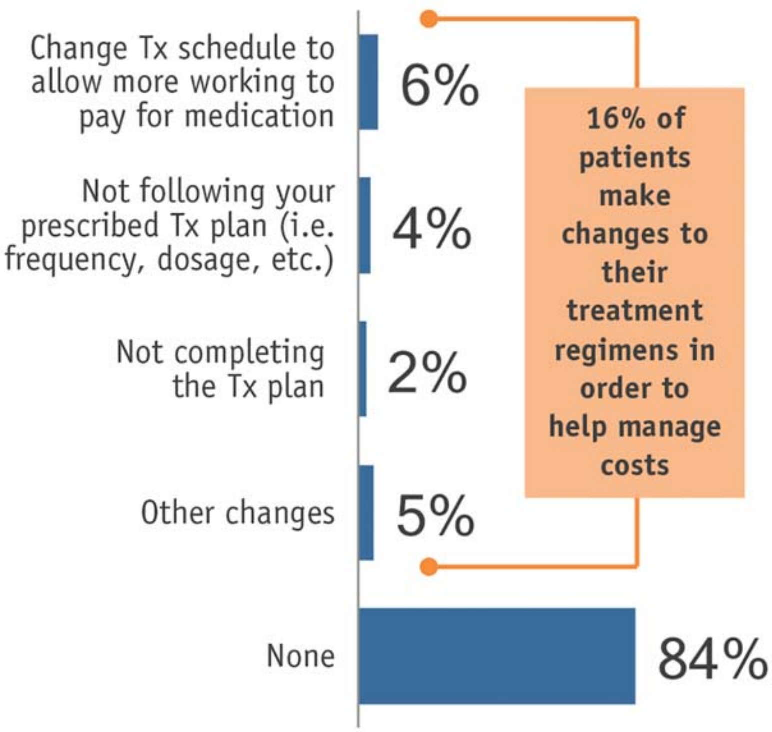


Figure 4



sacrifices run the gamut from not being able to fund a retirement account to not being able to pay children's college tuition, or in some cases, making the decision not to spend $100,000 or more for treatment which promises only to extend life by two additional months.

The reaction by a patient to a cancer diagnosis is no longer simply about getting treatment and focusing on the potential for success and survival. It's now also about the crushing burden of costs and whether they can afford the treatment which might provide the greatest hope (Figure 2).

There is a high level of anxiety associated with costs and the financial distress alone can impact a patient's health. As referred to by some as "financial toxicity," the increased burden of costs itself becomes a factor influencing a patient's health, either through treatment decisions that don't provide the highest quality of care or financial sacrifices that lower quality of life. Research suggests this toxicity may be linked to greater mortality. (*Oxford Journal*, November 2015) Not surprisingly, patients at lower income levels tend to be impacted more than other groups. In addition, females show a much greater level of concern about the medication and treatment costs than men (Figure 3) and tend to take more action in understanding the options. This response is more pronounced among younger patients and those whose length of therapy is less than one year.

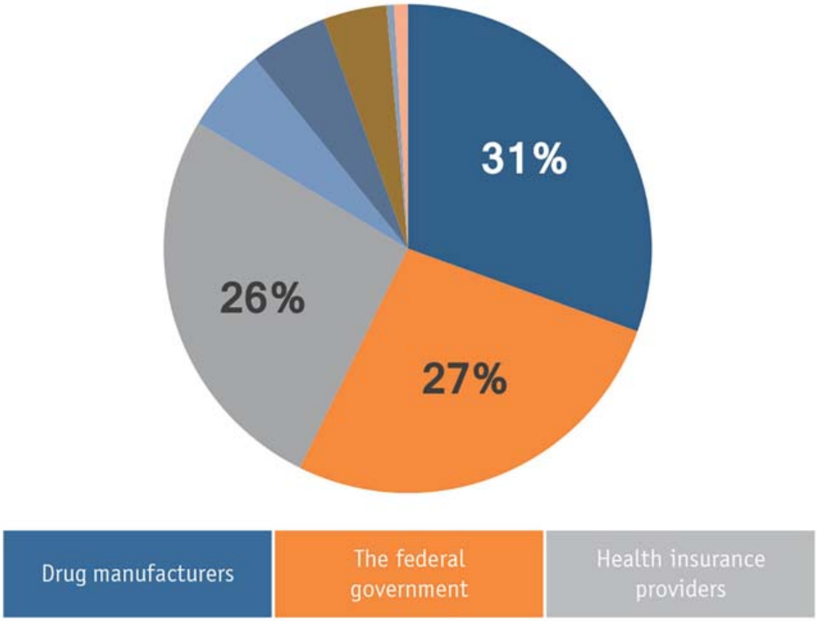
Patients are making hard decisions in order to pay for care and treatment. These decisions often include non-compliance to medication (using smaller doses of medication or taking drugs less frequently than recommended to make the refill go further) or changing treatment schedules to allow more time to work to pay for treatment.

Changing treatment plans means there's less potential for treatment to be effective but patients are struggling to make payments and simply cannot continue treatment as recommended (Figure 4).

When asked who was to blame for the rising costs, the response by patients was varied and highlights the confusion surrounding the health care process and who makes decisions and what factors influence pricing. Just under one-third of patients blame the

Figure 5

Who Is To Blame For The Rising Costs?



manufacturers, with 27 percent of the patients blaming the government and 26 percent blaming insurance companies.

Our ongoing research program is intended to address issues of relevance to the health care and pharmaceutical industries and, specific to this piece of research, help humanize the impact of rising costs. So much of the broader discussion is focused on the battle over pricing among manufacturers, providers, insurance companies and government. Let's not forget the human element.

Generate responses

The issue of cost for cancer drugs has begun to generate responses from clinicians. ASCO recently released a "value algorithm" designed to assess the potential value of a therapy for a specific patient. Cost is clearly a fundamental variable in that equation but perhaps the most expensive drug is not the most appropriate. Are there less-expensive alternatives that offer comparable outcomes?

Clinicians are slowly beginning to integrate the cost factor into their assessment of therapeutic options and are including the cost dimension in their conversation with patients and their family. While recognition of the issue is a critical first step, it does little to suggest a solution to the growing problem.

The Cancer Moonshot initiative has garnered significant media attention but has yet to suggest how its efforts will impact cost escalation. While efforts to reduce the cost of R & D are valuable and better data access and sharing can make the R & D process more efficient and timely, there has been no overt focus on what can be done to address the issue of cost to the patient and his/her family.

Recently, pharmacy service providers such as Express Scripts and CVS have made decisions to not include certain medications on their formularies. While the therapeutic areas most impacted do not include cancer, the precedent is profound. These pharmacy providers are essentially taking the therapy choice decision away from the physician and the patient. Such an option, while directly addressing the cost situation, seems to be one that may limit therapeutic options.

Carry a heavier burden

Without a cohesive plan of action for addressing the increasing costs of critical medication, one which includes consideration for the role of manufacturers, insurance companies, providers and government in the process, the patient and the patient's family is left to carry a heavier than expected burden. The issue is not whether we want the best medications in the world to treat oncology. It's clear we do. Unfortunately if patients whom we intend to treat with approved medication can't afford the treatment, then its potential is limited and the original purpose of providing quality care is lost.

Joel Schindler is oncology practice team leader for Cincinnati-based MarketVision Research. He can be reached at jschindler@mv-research.com.

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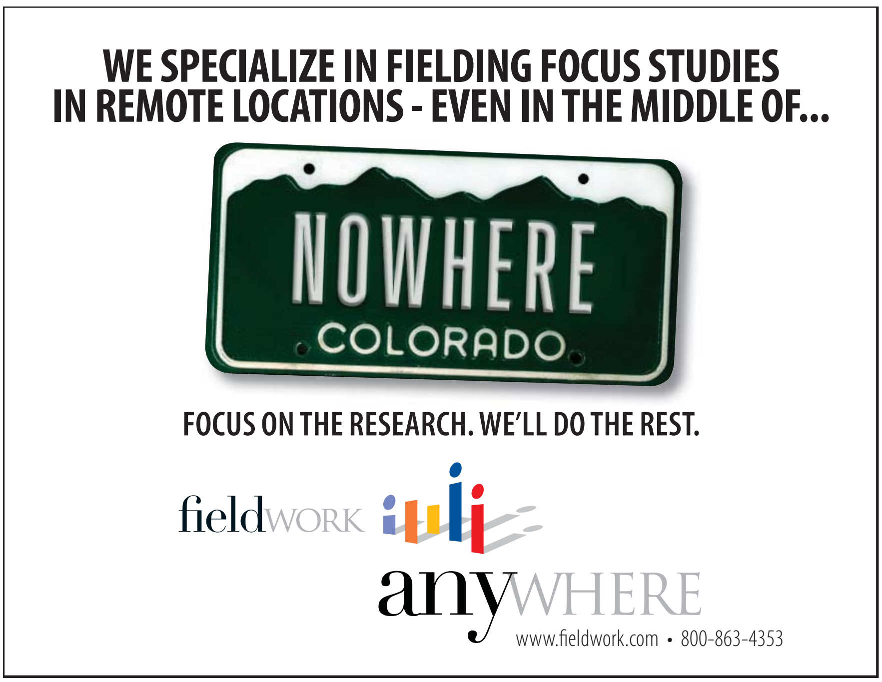

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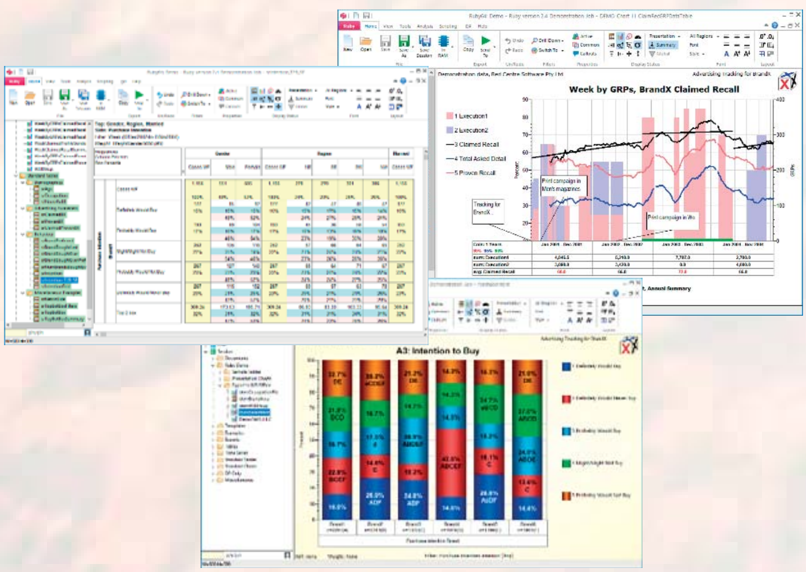

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Keep pace with the changes

Understanding coordinated care using online laddering techniques

| By Michael Kuehne

snapshot

Michael Kuehne makes a case for using qualitative approaches to add a humanistic element and prepare health care organizations for a consumer-centric world.

The time is now for the hospital and health systems industry to move toward a coordinated care model. The way internal medicine is delivered to patients is changing at an unprecedented pace due to a shift in policy and the move toward consumerism. To prepare for these changes hospital and health systems must change the way they think about research, which has tended to be slow (mail surveys), usually quantitative and lacking a humanistic element. When combined with quantitative techniques, asynchronous qualitative coordinated care research prepares the industry to maintain patient panels and adapt to changes.

Beginning in 2017, the Medicare Access and CHIP Reauthorization Act of 2015 (MACRA) policy will begin to affect the health care industry. As Deloitte (2016) has stated: "MACRA is expected to drive care delivery and payment reform across the U.S. health care system for the foreseeable future. Congress intended MACRA to be a transformative law that constructs a new, fast-speed highway to transport the health care system from its traditional fee-for-service payment model to new risk-bearing, coordinated care models. It has the potential to be a game-changer at all levels of our health care system."

Despite the impending legislative changes, awareness among providers whose practices would be affected by MACRA is dangerously low. The Deloitte Center for Health Solutions 2016 Survey of U.S. Physicians found that: 50 percent of non-pediatric physicians surveyed have never heard of MACRA; 32 percent only recognize the name; and 21 percent of self-employed physicians and those in independently-owned medical practices report they are somewhat familiar with MACRA, versus 9 percent of employed physicians surveyed.

Significant revenue is at stake in the new risk-bearing coordinated care model. To adapt to the changes, a consolidation of the market will likely occur. Smaller private practices less-equipped to bear the level of risk needed to maintain their business will join larger networks. For large and complex organizations, coordinating care will require investment in information technology to support collaboration within the affiliated network of providers.

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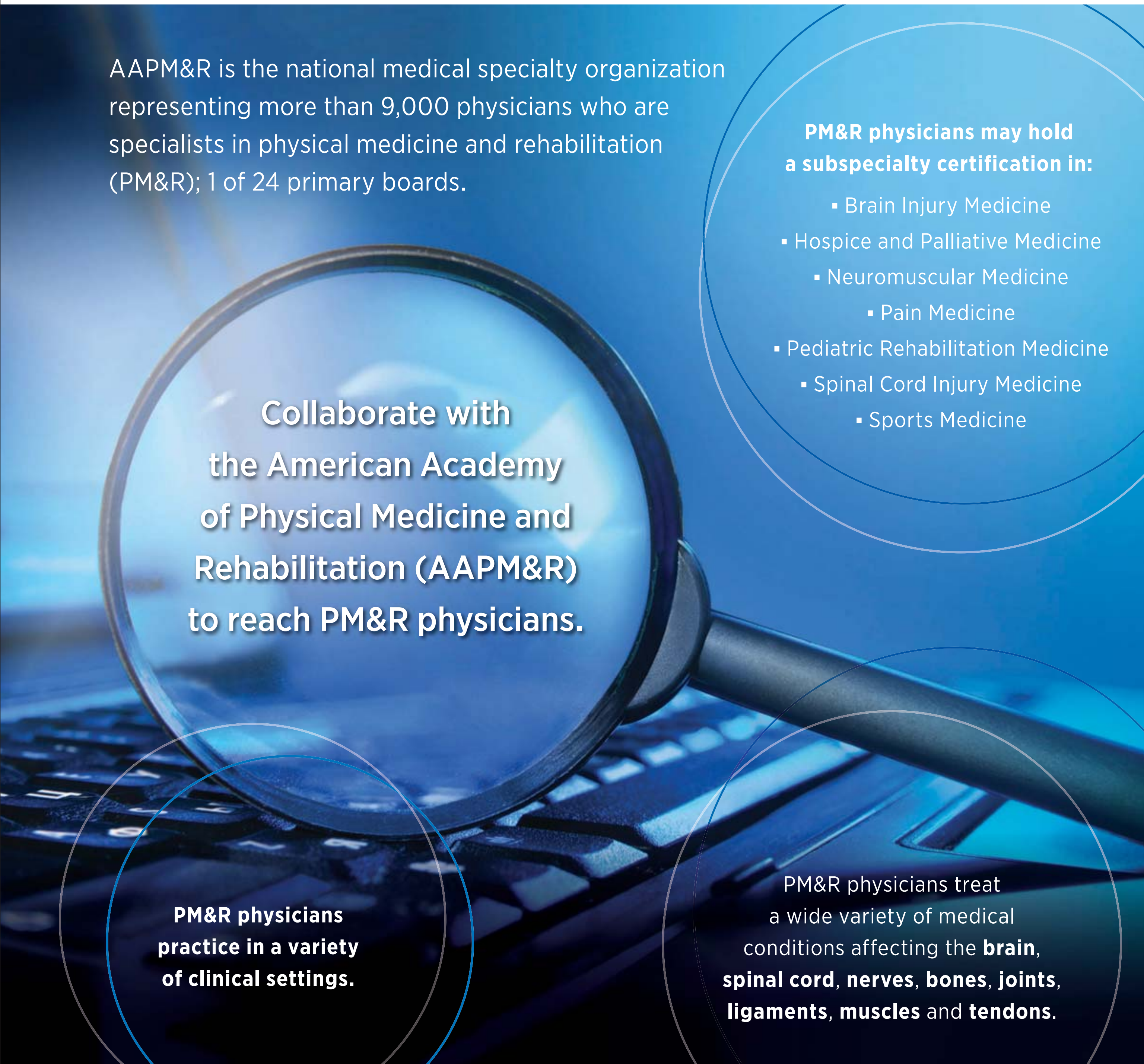
Look at Panels and Research Through a Different Lens



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By improving care coordination, hospital and health systems will be able to maintain or grow their patient panels (market share) and showcase how they treat patients more like consumers.

Level of continuity

Care coordination activities that will soon become best practices for performance measurement include helping with transitions of care, assessing patient needs and goals, creating proactive care plans, linking community resources, monitoring and follow-up (including responding to changes in patient needs). These activities increase the quality of care in addition to providing a level of continuity to patients during their treatment journey.

Care coordination is valuable to patients because it provides them with a continuous treatment experience from admittance through to rehabilitation. For example, a patient in a coordinated care model will have access to a connected network of providers for treatments such as: cardiology; geriatrics; orthopedics; primary care; diabetes and endocrinology; gastroenterology; infectious diseases; obstetrics and gynecology; and pulmonary and sleep.

In complex hospital and health systems, many patient concerns often arise, including those related to provider intra-communication and records-sharing. Take the example of medication lists, which are not always reconciled across provider networks (i.e., when an oncologist prescribes a medication whose drug interactions a dentist treating the same patient is unaware of). Similarly, when a patient sees multiple specialists they often need to explain their medical history to each one. The lack of coordinated care can leave patients discouraged and frustrated, increasing the likelihood of noncompliance and ultimately causing them to leave the network.

Change the way they work

Implementing care coordination will be challenging, as it will require that health services staff change the way they work. Chief among this, primary care providers, nursing and administrative staff will need to learn how to use electronic health records (EHR). As part of EHR adoption, hospitals and provider offices will install in-office computers to gain immediate access to medical information and history. While in-office computers allow providers to deliver a higher level of continuity to the patient, they require primary care providers and nursing staff to juggle the amount of attention they give to computers versus patients. However, by having access to EHRs via in-office computers, providers and staff can ensure that both informational and management continuity is being delivered to patients.

Informational continuity means that providers and patients have all the information they need or request. Management continuity means that multiple providers are in agreement about a patient's care and the patient understands the next steps (Haggerty et al. 2003). Delivering both informational and management continuity requires active communication and teamwork among primary care providers, as well as the related nursing and administrative staff.

A research study conducted by Graetz et al. (2014), explored the association between electronic health records and care coordination. Specifically, the study recognized the need to understand and measure organizational factors and the effects team cohesion can have on successfully delivering care coordination in practices that have instituted electronic medical records.

This multi-year study quantitatively surveyed primary care clinicians in large, integrated health care systems that were, during the time of the study, deploying electronic heath records in their practices. Clinicians completed three surveys between 2005 and 2008. Over 1,500 survey responses were collected during this period.

Care coordination was measured in three dimensions closely correlated with informational and management continuity: access to timely and complete information, treatment agreement and responsibility agreement.

To better understand how organizational factors may change the effects of EHR on care coordination, the researchers employed quantitative team cohesion measures. Team cohesion questions were developed using published validated instruments (Ohman-Strickland et al. 2007). Using a five-point Likert agreement response scale, each clinician was asked:

1. "When there is conflict on this team, the people involved usually talk it out and resolve the problem successfully."
2. "Our team members have constructive work relationships."
3. "There is often tension among people on this team." (reverse scored)
4. "The team members operate as a real team."

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The method used by Graetz et al. provided a good illustration of the impact team cohesion can have on coordinated care. However, this approach can be taken a step further to capture even deeper insights.

Qualitative asynchronous techniques

Coordinated care is asynchronous, and engaging practice staff using in-the-moment qualitative asynchronous techniques is a complementary tool to understand the delivery of informational and management continuity. Taking Graetz et al.'s approach further requires the blending of mobile qualitative data collection techniques together with the quantitative measurements used by the Graetz team. As a result, researchers will be able to interject a much-needed human element to the quantitative data.

The added qualitative component can draw upon a new laddering technique proposed by Moradin et al. (cited by Takhar-Lail and Ghorbani 2015), which lends itself to the asynchronous nature of both coordinated care and qualitative mobile online communities. Employing this approach would enable researchers to measure team cohesion across various levels of hospital and health system staff. The technique focuses on creating cognitive schemas consisting of declarative knowledge units (motives). Connecting these motives is procedural knowledge.

The new laddering can be best described as: "First, respondents list their personal reasons for choosing a focal goal (e.g., health care system coordinated care). After listing all of their reasons, respondents return to each reason they gave and justify why each reason was important to them." (Takhar-Lail and Ghorbani 2015).

Using this technique, primary care providers, nurses and practice administrators could participate in online mobile research communities and complete laddering activities on their own terms. This may include a variety of video testimonials, journal exercises, journey maps and projective techniques. The data collected would be idiosyncratic and the raw data then segmented into response categories, which would be further broken down into goal categories (e.g., reduced length of patient visit and installation of in-office computers), and treated with semantic analysis.

Provide a humanistic element

As organizations work to deliver coordinated care, the inclusion of qualitative research will provide a humanistic element that can better prepare them for a risk-bearing, consumer-centric health care world. Hospitals and health systems are businesses and brands deeply rooted in human interactions. Very few industries have this level of consumer connection, which is why understanding the entire ecosystem responsible for delivering coordinated patient care is imperative. Providing best-in-class coordinated care experiences to patients will ensure that hospitals and health systems are truly poised for the future of internal medicine.

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Beyond NPS

Multi-measurement approaches for brand health

| By Erin Leedy

snapshot

Erin Leedy uses an assessment of social media brands to examine strategies for brand health measurement.

Our firm is often asked to recommend research approaches that guide decisions about marketing, as well as product and brand management. A topic that's been of great interest among our clients lately is brand health. Net Promoter Score (NPS) has been the go-to measure for some time but there are numerous other research approaches that may be used to gauge and track brand health over time – some of which may be better-suited to brands in sectors that may not be well served by an approach built around promotion. We were curious to compare NPS to other brand health measures in a controlled way, so we used our quarterly consumer omnibus study as a research sandbox to allow for some investigation.

Specifically, we fielded various questions and used the results to test the efficacy of brand health approaches that would serve clients across industry sectors well. We surveyed more than 1,100 U.S. consumers regarding brands in the social media space. We then used these data to run multiple brand health analyses, ultimately comparing NPS and several brand health measures and indices at how well they predict our dependent variables: frequent use of the brand and intention to increase use of the brand in the near future.

If your company uses NPS (and particularly if you're using nothing but NPS), we encourage you to keep reading. At the end of this article, you may find yourself:

- considering the pros and cons of NPS and how to optimize it using other approaches and measures;
- engaging with clients, internal customers and stakeholders to determine the best approach for measuring brand health given the marketplace, brand position and goals;
- evaluating brand health approaches that employ multiple measures (e.g., NPS, other primary research results, customer transactional/behavioral data, data from social media, etc.) for a more holistic health assessment.

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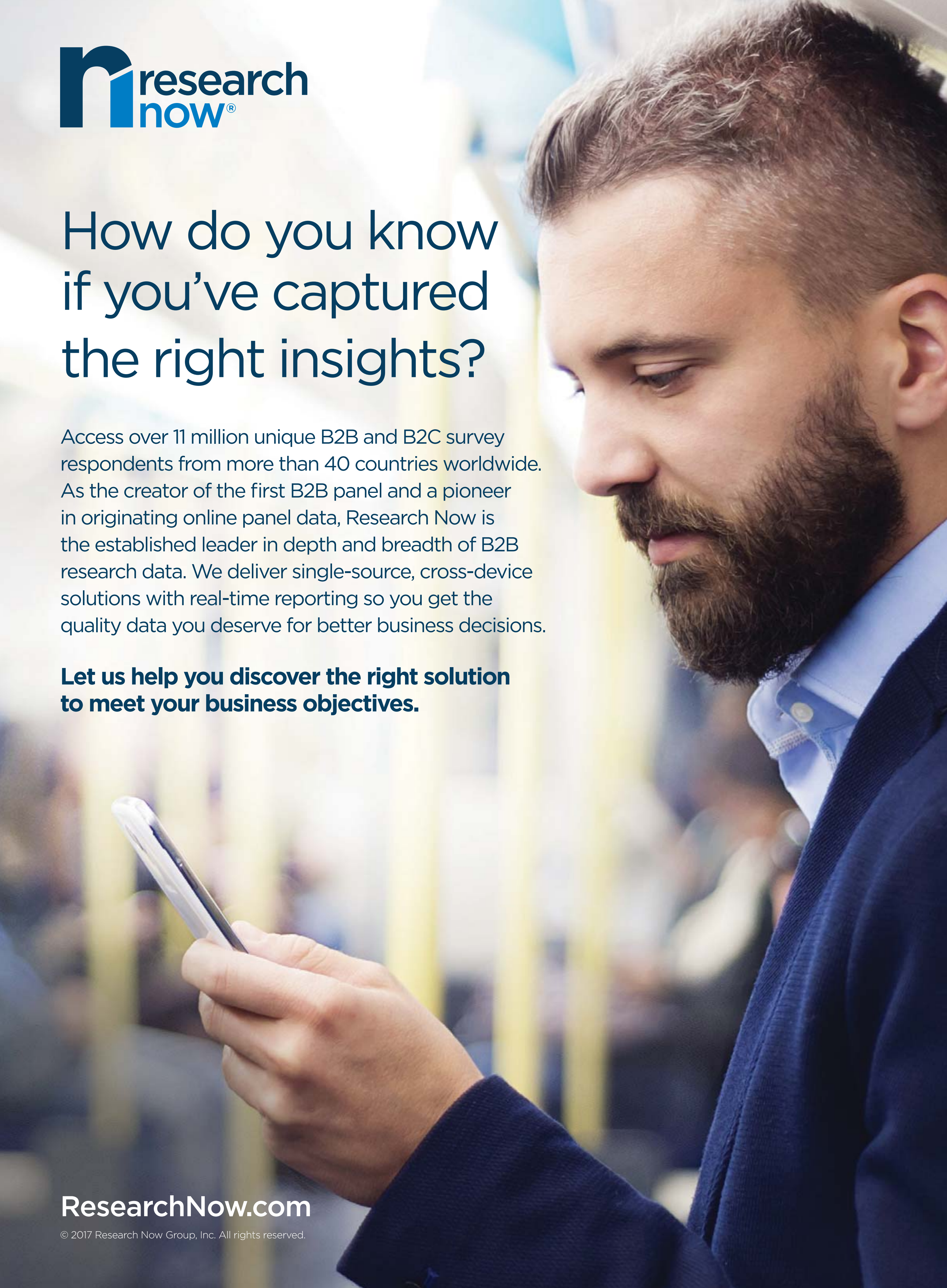
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Before we dive into our study results, however, here's a brief look at NPS as a measure. NPS is a management tool used to gauge a brand's customer loyalty or brand health. It grew out of dissatisfaction with customer satisfaction research and a desire to focus on a metric that better measures loyalty.

The metric was developed by Fred Reichheld, Bain & Company, and Satmetrix; Reichheld introduced it in a 2003 *Harvard Business Review* article. The Net Promoter Score (subtracting brand Detractors from Promoters) was presented as "the one number you need to grow." NPS scores range from -100 (all Detractors) to +100 (all Promoters). A positive net score is deemed good; a score of 50+ excellent.

Acceptance of NPS was strong and swift, as it moved away from long questionnaires and complex satisfaction models. However, it has also been criticized regarding its efficacy. Historically, customer-related initiatives focused on: continuous improvement – maximizing high scores; or minimizing defects – eliminating low scores/performance.

On the surface, NPS seems to be an effective combination of the two but in practice, NPS blurs the issues:

Facebook and YouTube lead in terms of brand familiarity; Pinterest is particularly strong among females

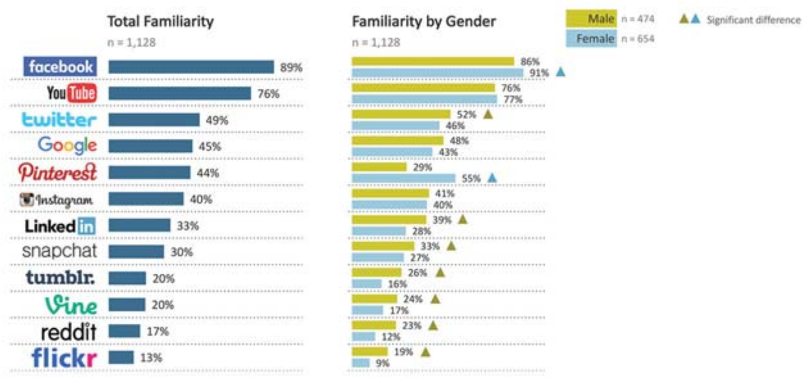

Figure 1

Facebook, Google+ and Instagram are brands used most frequently; usage frequency unlikely to increase for most brands over next 3 months

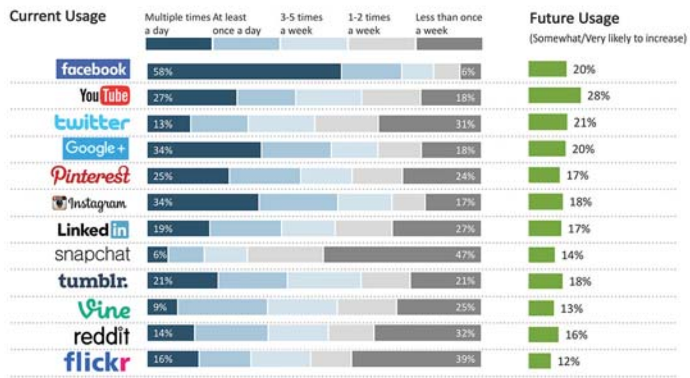

Figure 2

- As is the case with any net score, vastly different scenarios can result in the same Net Promoter Score and require different actions from the brand.
- Because NPS itself can hide so much, questions usually follow. "What are the Promoter and Detractor percentages?" "NPS went up last wave, so what changed? Do we have more Promoters or fewer Detractors?"

NPS can be a valuable tool when there's a desire for simplicity – a single question to be posed and tracked, which can be attractive to senior management – as well as a desire to use a metric that's known and well-established. But it is not without its drawbacks.

Before diving into alternate approaches for measuring and tracking brand health, let's consider the benefits and drawbacks of NPS (see chart) as a single measure of brand health.

Given the limitations of NPS as a sole measure for brand health, approaching brand health more comprehensively – whether via multiple measures or a calculated index score, incorporating NPS or setting it aside – may prove more useful. It's this broader approach that we recently decided to play with in our research sandbox.

To test some brand health approaches, we recruited 1,128 qualified respondents 18 years or older and living in the U.S. via panel to take an online survey about 12 popular social media brands: Facebook, Flickr, Google, Instagram, LinkedIn, Pinterest, Reddit, Snapchat, Tumblr, Twitter, Vine and YouTube.

We asked respondents about: top-of-mind, unaided and aided awareness; familiarity with each brand; usage (mobile vs. browser; frequency of use; change in future usage frequency); 12 social media attributes (brand fit); positive or negative view of the brand; overall satisfaction; and likelihood to recommend.

Given what we know about the social media space, we identified two behaviors that seemed to fit with a healthy social brand: consumer frequency of use and intended frequency

Benefits

- A single question, easy to administer and calculate results
- Intuitive – are you for or against us?
- Attractive to time-starved senior managers
- 13 years since its introduction, it is a well-established metric employed across industries
- Valuable metric for industry sectors driven by recommendations and WOM

Drawbacks

- Doesn't always correlate to growth; may have lower correlation than c-sat
- Claims are unverifiable; no published, reproducible proof; evidence has shown that it can be one of the worst predictors of customer behavior
- Oversimplifies the brand health story; while intuitive, it's not always enough on its own
- May not fare as well in sectors where value and price are primary influencers

Social media are good for keeping connected, exposure to new ideas and sharing, though many users tend to lurk more than to share

Attributes *I find this social media...*	facebook	YouTube	twitter	Google+	Pinterest	Instagram	LinkedIn	snapchat
	n=821	573	268	260	230	246	103	177
Is unique	47%	60%	44%	38%	63%	48%	49%	62%
Keeps me connected	72%	29%	35%	40%	24%	51%	41%	49%
Exposes me to new things	40%	53%	41%	41%	76%	38%	41%	37%
Has news and breaking information	36%	30%	39%	38%	22%	27%	34%	28%
Is a primary entertainment	42%	61%	35%	33%	45%	43%	24%	47%
Promotes business	23%	27%	32%	32%	30%	40%	52%	31%
Helps me express opinions / thoughts	44%	28%	42%	35%	32%	38%	38%	48%
That I view other's posts more than I post	74%	69%	56%	46%	60%	59%	48%	55%
Makes me happy	43%	60%	35%	34%	65%	47%	33%	53%
Is preferred	72%	43%	33%	32%	42%	37%	34%	39%
Is trusted for sharing	37%	32%	40%	40%	37%	49%	49%	43%
Is easy to use for sharing	70%	46%	49%	40%	57%	55%	44%	58%

Figure 3

Likelihood to recommend is highly correlated to satisfaction and general positive view of the brand

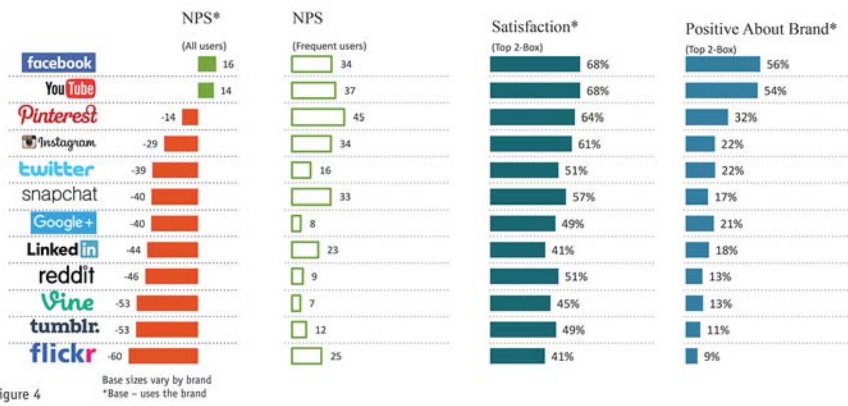

Figure 4

of use going forward. Our brand health analyses would focus on what measures – whether brand awareness, promotion, satisfaction, strong performance on various brand attributes – would more strongly predict the desired behaviors of frequent use now and in the future.

Overall brand data

Before we dig into brand health, let's start by looking at some overall market brand data. Here's what we found regarding the brands' relative footprints in the U.S. As shown in Figure 1, Facebook and YouTube lead in terms of brand familiarity and Pinterest is particularly strong among females.

We also find that respondents use Facebook, Google+ and Instagram most frequently and that usage frequency looks relatively stable for most brands over the subsequent three months, with modest increases indicated (Figure 2).

We see a good deal of brand differentiation on various brand personality attributes, which is helpful when hoping to use such attributes to develop a brand health score. Social media are deemed good for keeping connected, exposure to new ideas and sharing, though many users tend to lurk more than to share (Figure 3).

As you might expect, likelihood to promote a social media brand is highly correlated with brand satisfaction and a general positive view of the brand (Figure 4).

NPS alternatives

Using those findings as a baseline, we began our investigation into NPS alternatives. We wanted to find a question or set of questions that would do a good job at identifying a healthy social media brand, with healthy, in this case, defined as a brand that was being used frequently now and going forward. In our research, we used results from the consumer behavior questions – frequency of use of the brand and inclination to increase this use going forward – as a proxy for actual usage behavior. In the real world, if a social media company were developing a brand health program, they could incorporate actual usage data into their analyses over time.

Our analyses included a series of brand personality attributes, higher-level brand health measures and the two usage variables that we were aiming to predict.

Personality attributes: a series of rated statements such as...

- I find [brand] unique – there's no other social media platform like it
- I use [brand] to get new ideas and be exposed to new things
- I get my news and breaking information from [brand]
- [Brand] is a primary source of entertainment for me
- [Brand] helps keep me connected to those I care about

Higher-level measures:

- What is your view of [brand]?
- Overall, how satisfied or unsatisfied are you with each of these social media brands?
- How likely are you to recommend this social media brand to others you know?
- Net Promoter Score

Dependent variables:

- How often do you use each of these social media platforms via the Web site or the mobile app?
- Over the next three months, do you expect your use of this social media platform to...?

We evaluated multiple solutions and identified several that did a good job of predicting one of the behaviors: high overall usage or high intended future usage.

We found that a brand health score comprised of results from three rating questions – consumers' positive view of the company, whether the brand helps a consumer to "promote myself/my business," whether the brand helps consumers "get breaking news" – was better than NPS at predicting high intended future usage.

We found that a brand health score comprised of results from three rating questions – consumers' overall satisfaction with the brand, consumers' positive view of the company, whether

Per Brand Health Index #1, Facebook and YouTube brands are strongest, driven by positive brand view

> LinkedIn's strong showing is driven by the ability to keep folks connected while that of YouTube is driven by "positive view" of the brand and high satisfaction.

> The weakest brands – tumblr and snapchat – show weakness with "positive view."

	facebook	twitter	LinkedIn	Pinterest	Google+	tumblr.	Instagram	flickr	YouTube	reddit	Vine	snapchat
Brand Index	324	307	316	310	311	303	309	310	324	306	312	299
Top 2-Box (% Using)												
Satisfaction	66%	61%	61%	52%	59%	40%	59%	55%	64%	61%	61%	64%
Positive view	56%	22%	18%	32%	21%	11%	22%	9%	54%	13%	13%	17%
Keeps me connected	72%	35%	41%	24%	40%	42%	51%	61%	29%	42%	47%	49%

Figure 5

Focusing solely on NPS highlights Facebook and YouTube but provides little additional insight on brands beyond the market leaders

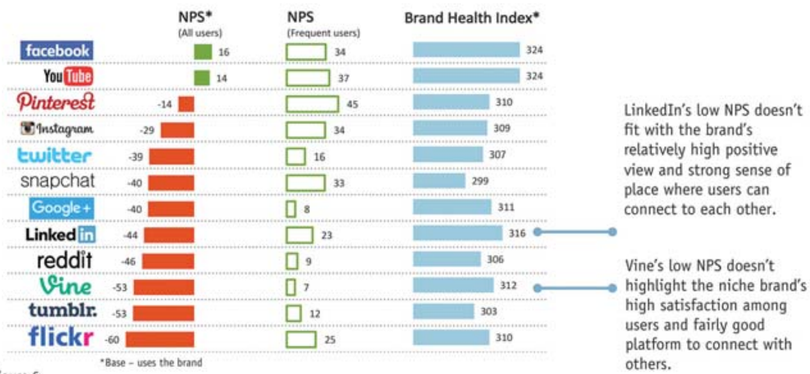

Figure 6

the brand "keeps me connected" – was better than NPS at predicting high current usage frequency.

Ultimately we selected the second solution as the best outcome for this test study, as it focuses on current behavior instead of anticipated future behavior (which might end up being different from what's anticipated).

Here we can take a look at our brand health index score and how the various companies stack up (Figure 5).

Facebook and YouTube brands are the healthiest, with strong performance driven by both overall satisfaction and strong positive brand view among consumers. Facebook is particularly strong when it comes to "keeps me connected" as well. A bit behind the leaders, LinkedIn's strong showing is driven by its ability to keep people connected. The least-healthy brands – Tumblr and Snapchat – show weakness when it comes to having a strong positive brand view.

We can compare brand results for NPS and our health index and draw some useful insights (Figure 6). If we were to focus solely on NPS, we'd still see strong scores for Facebook and YouTube but we'd miss additional insight on brands beyond the market leaders. LinkedIn's middling NPS doesn't fit with the brand's relatively high positive view and strong sense of place where users can connect to each other. Vine's low NPS doesn't highlight the niche brand's high satisfaction among users and its strength as a platform on which people can connect with others.

A useful measure

We see NPS as a useful measure when asked and analyzed along with other measures of brand health that look beyond customer brand promotion. Multiple measures may be used, whether independently or indexed, to get a broader understanding of a brand's health as compared to the competition.

When making decisions about which brand attributes to measure and track, a company should take a good look at its brand given the broader market context, as well as what characterizes a healthy brand within that space. When designing a brand health study, the research team should include questions that measure distinct brand strengths, which may include other engagement measures beyond promotion.

Clarity: Do I know this brand and what it stands for? Does the brand stand for something unique in the market?

Relevance: Does the brand fit my needs? Do I choose to use the brand?

Congruency: Does the brand consistently deliver on its promise?

Engagement: Am I engaged – do I advocate for the brand? Do I engage with this brand over others?

Keep in mind that beyond survey results, additional measures may be incorporated into brand health scores:

Data from social media. Social media data for brands – comparative volume, sentiment and engagement measures – may be used as a component of brand health.

Customer transactional/behavioral data. Beyond incorporating into the health score itself, customer data may be appended to help characterize research results (e.g., profiling customers who give high brand health score vs. those who give low score for better diagnostics). Note that this is a customer-focused approach, as it's often difficult to obtain behavioral data for non-customers.

Pay off soundly

As shown in this study, NPS/promotion may be incorporated directly into a brand health score, considered as a separate brand health measure or excluded entirely. Ultimately, the decision about what measure(s) to use for brand health is an important one that may take some time to resolve but the work put in upfront in determining the best approach should pay off soundly as the well-considered brand health program takes off.

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22 TOP SENSORY RESEARCH COMPANIES

When it comes to testing your product on consumers, there are many effective ways of going about it. But if you have a product that requires tasting or smelling, sometimes you need to find new ways to delve deeper into what consumers are thinking and feeling; ways that go beyond answering survey questions or conducting interviews.

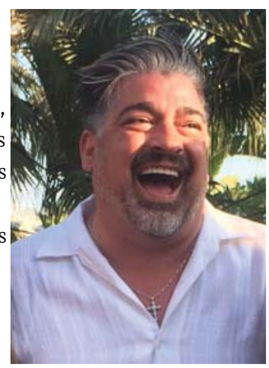
Through the use of sensory research, you can utilize the five senses – sight, smell, hearing, taste and touch – to uncover consumer insights. Allowing consumers to use their senses to test and observe your product can give you much deeper and more useful insights into how your product compares to the competition, even looking at the shelf life and the overall satisfaction of your product. To help you do this, you need a sensory research company that can give you the tools and methods you need to test your product and receive useful consumer feedback. If you're looking to test your new food or beverage product on consumers, these companies can provide test kitchens and taste tests to give you the best insight. These companies are also there for you when you need facilities equipped with audio and video capabilities to enhance the consumers' experiences. Or they can provide eye-tracking capabilities to get an in-depth glimpse of what the consumer sees. If you want to dive deep into how consumers truly interact and understand your product, these sensory research companies can help.

quirks.com/articles/2017/20170333.aspx

answerquest
... at your service

AnswerQuest, LLC

Founded 2005, became a sensory facility in Boston in 2009 | 21 employees
Jason R. Miller, CEO



With almost 10,000 feet of space just outside Boston, AnswerQuest is the Northeast's premier sensory facility. AQ's test kitchen comes fully equipped with

both upright and walk-in coolers and freezers, stainless prep counters, tables and serving carts, residential ovens and dozens of microwaves. Abundant storage, plentiful outlets and an additional 400 free amps is available for specialized equipment. Our team is experienced in sensory, and our sensory director (a trained chef) oversees every test personally. With a database of almost 100,000, we can tackle even the most challenging specifications, and our trained recruiters fulfill quotas on time and within budget.

Phone 781-897-1822
www.answerquestresearch.com

Area Wide Market Research, Inc.

Founded 1988 | 20 employees
Ann Weinstein, CEO

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

Phone 301-590-1160
www.areawidemarketresearch.com

C&C Market Research

Founded 1992 | 700 employees
Thomas Morrison, Project Director

C&C Market Research is the complete answer to all your data collection needs. For over 25 years our data collection specialists and field locations, coupled with our proprietary programming and data transmission capabilities, have ensured countless successful projects for all our clients. We are the largest privately-owned and -operated data collection company in the U.S. and have remained a leader in today's marketplace through hard work, ingenuity and a dedication to quality. During this time, we have worked on numerous sensory-related projects in each of our facilities. Whether it be a fine fragrance, cosmetic, home good or any other sensory-related project, we have experience across the board.

Phone 479-785-5637
www.ccmarketresearch.com

CEC Research

Founded 2013 | 10+ employees
Maryana Kaplan, CEO

CEC Research is your premier field and tab partner – delivering proven research methodologies, superior recruiting capabilities, state-of-the-art database management technology and impeccable study execution. CEC Research provides personalized solutions to meet diverse consumer product and sensory research needs of clients from the flavor, fragrance and consumer products industries. CEC's brand new, state-of-the-art facility is technologically equipped to accommodate any testing our clients require. CEC has an extensive and diverse consumer database ready to meet our clients' varied research needs. The CEC Research testing facility is located in a premium business park in Cranford, N.J., a short drive from New York City.

Phone 908-967-6790
www.cecresearch.com

Creative Consumer Research

Founded 1976 | 76 employees
Patricia Pratt, CEO

For 40 years CCR's mission has been to provide clients accurate and actionable information to develop strategic solutions. This includes having an expertise in mystery shops, on-site interviewing, in-store intercepts and store audits on a national level. CCR has the capability and location space to conduct studies with up to 200 respondents. Our experience includes all aspects of taste tests and sensory, as well as interactive research with automobiles, farm equipment, motorcycles, large appliance testing, cosmetic products, alcoholic and non-alcoholic beverages and a variety of food products specifically focused to targeted ethnic groups, low-incidence usage, adults 55+ and children. CCR has partnered within a variety of industries including health care, automotive and consumer goods.

Phone 281-240-9646
www.ccrsurveys.com

CRG Global Test America

Founded 1989 | 450 employees
Mary Cunningham, CEO

CRG Global Test America is the premier data collection resource in North America. We have expertise in product testing in every category of consumer packaged goods, from fine fragrances to pet care to alcoholic beverages and everything in between. Our consumer test studios are purpose-built for a wide array of product testing, featuring sensory booths, ventilated fragrance chambers with sinks and mirrors, fully-equipped test kitchens (consumer and commercial), laundry rooms, large testing areas with client viewing and more. We specialize in both traditional and niche recruiting, and our use of advanced technologies is a key component to enabling a seamless blending of multiple methodologies. CRG's Survey Passport Mobile app and QualTopics SMS chat moderation software enable in-the-moment, in-depth consumer interactions. Datatelligence Online is our online community of over 400,000 households.

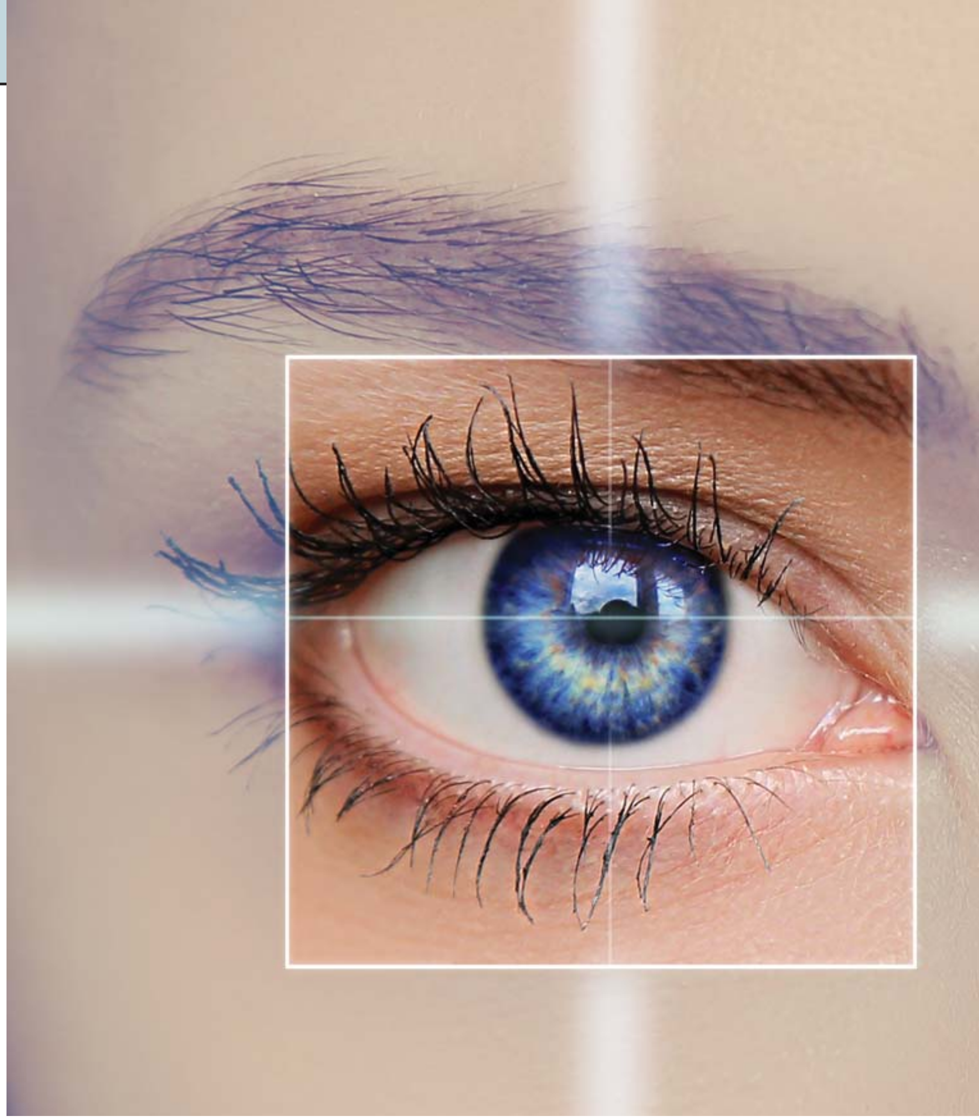
Phone 866-209-2553
www.crgglobalinc.com

CSS/datatelligence

Founded 1989 | 110 employees
Mary Cunningham, CEO

CSS/datatelligence offers expertise in a wide variety of cutting-edge research methodologies, unequaled savings and the benefit of working with a vertically-integrated supplier for your business initiatives. With 20+ facilities in the United States and 400,000+ members in our online panel, we have unparalleled access to the American consumer. Our U.S. capabilities, combined with long-standing international partnerships, give us a worldwide reach, allowing us to conduct projects globally in a broad range of categories including fragrances, health and beauty aids, food and beverages and more.

Phone 866-209-2553
www.cssdatatelligence.com



Focus World International, Inc.

Founded 1980 | 44 employees
Gary Eichenholtz, CEO/CFO

Focus World International (FWI) celebrates 37 years of success in market research. Only FWI can provide a purpose-built, custom-designed sensory testing facility complete with 16 E-Sense chambers to meet the tight deadlines and complex randomizations of sensory research studies! With our guaranteed data validity and our paid-to-pay-attention approach to project management, complemented by our ability to maintain control of all possible variables within the evaluation environment (aeration/exhaust, lighting, humidity, facial reaction, crosstalk-contamination, etc.) that could adversely affect the integrity of data, our clients are able to make actionable decisions with confidence based on the facts, not just a leap of faith. Our chambers are rated "best" in the industry by an independent third party. Experience the difference!

Phone 732-946-0100
www.focusworldinternational.com and www.focusworldint.com

Food Perspectives, Inc.

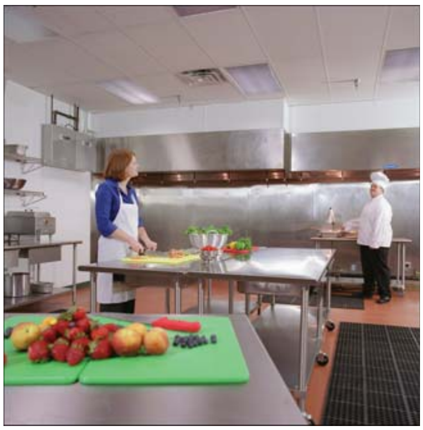
Founded 1990 | 75 employees
Nancy Eicher, CEO

Food Perspectives, a Covance Food Solutions company, offers our clients end-to-end product research services, including product design and prototyping, descriptive analysis, sensory optimization and consumer validation. With academic backgrounds in sensory science and market research plus extensive industry experience, the FPI team custom designs research to your needs. Proven scientific methodologies ensure the highest levels of accuracy and reliability while advance analytics and insightful interpretation provide confidence in your product development decisions. Our Minneapolis-based headquarters features state-of-the-art kitchens and research spaces to accommodate even the most complex needs. FPI conducts research across the U.S. and Canada as well.

Phone 763-254-2770
www.foodperspectives.com

Herron Associates, Inc.

Founded 1958 | 45 employees
Sue McAdams, CEO



Leading sensory clients choose Herron for years of experience, large state-of-the-art facilities in Indianapolis and Tampa and seamless deliverables on projects anywhere. We partnered with leading culinary teams to bring you kitchens designed by experts for the best culinary experience. Our spacious Indy facility offers a 960-square-foot commercial kitchen with large research suites accommodating up to 50 respondents. Our Tampa office offers a large kitchen as well as large research suites accommodating up to 30 respondents. Partner with Herron on your next project for a fresh perspective on your sensory study and see why clients always make Herron their first call.

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

INGATHER Research & Sensory

Founded 2001 | 25 employees
Bob Chapin, CEO

INGATHER Research & Sensory® is The Leader in Marketing Research In-Context™. Providing both traditional and alternative qualitative and quantitative research, INGATHER's Unsalted Cracker Lab™ is ideal for new menu testing and includes a full commercial kitchen, bar and restaurant within the space.

The Common Sensory™ is perfect for both ingredient and CPG research, housing full consumer testing capabilities with break out rooms. INGATHER's 12,000-sq.-foot facility was built by researchers/scientists to meet the evolving sensory needs of today and the innovative in-context needs of the future. Whether it's cleaning products, fragrance, automotive, cosmetics, pharma or gaming, INGATHER can handle your sensory testing needs.

Phone 303-988-6808
www.ingatherresearch.com

Insight Evolution

Insight Evolution

Founded 2010
Thais Senger, Owner

Insight Evolution is a small, personalized sensory and market research company with a large global reach. Our company is devoted to understanding the consumer and their true aspirations and motives that drive appreciation of products and services. This focused personalized view recognizes each project for its own uniqueness, thus enabling us to customize, tweak and develop research techniques that draw from our extensive qualitative and sensory experience. IE has also designed numerous trained sensory panels, mainly in food, personal and home care industries. Highly experienced in all stages of product development and innovation, we view ourselves as an extension of your team.

Phone 201-927-1977
www.insightevolutionllc.com

isr The Institute for Sensory Research
Sensory. Science. Success.

The Institute for Sensory Research

Founded 2000 | 30 employees
Avishan Amanat, Director

Located just outside New York City, ISR is a nationally-recognized, full-service sensory research organization. We provide discrimination and descriptive panels, sensory testing facilities and client-site sensory solutions. We are one of the most experienced scientific sensory research organizations with 15+ years of working with food, beverage, home care and personal care manufacturers. Our approach links established sensory and scientific methodologies with strict quality controls to provide reliable research results for confident decision-making. Superior sensory facilities including 12 food/beverage booths, 23 sink booths, seven home care rooms (washer, dryer, sink and toilet), washable surfaces and programmable HVAC system.

Phone 914-696-5155
www.sensoryguidance.com

JACKSON RESEARCH
A cut above

Jackson Associates Research, Inc.

Founded 1957 | 35 employees
Marisa L. Pope, CEO

With over 18,000 feet of research space across two locations in Atlanta, Jackson Associates' test kitchen, equipped with 142 cubic feet of walk-in refrigeration, 36 feet of stainless prep, fryers and prep tables, is the largest and most conveniently-located in the city. Couple that with our viewable CLT labs and luxurious focus suites and it's easy to see why clients love our facilities. But it's our experience that sets us apart; our average manager has more than a decade in research, which means less work for our clients. Our database of almost 200,000 makes even the most challenging recruit achievable.

Phone 770-394-8700
www.jacksonassociates.com

KMR
Karchner Marketing Research, LLC
KMR Research Studio
3956 Ridge Pike
Collegeville

KMR Research Studio

Founded 2014
Helen Karchner, CEO/Co-Founder

The KMR Research Studio is perfect for your sensory research! Located in the true Philadelphia suburbs, it offers a plethora of untapped, research naïve respondents, professionally pleasing atmosphere, at a prudent price. This aesthetically pleasing facility offers an environment whereby respondents are relaxed, allowing them to share more deeply, more openly, more authentically. Evoke, harness, then take advantage of these powerful responses to non-conscious stimuli. Whether health care devices or personal care products, using effective testing (including descriptive and discrimination tests) or affective testing (qualitative consumer focus groups), The KMR Research Studio is the best venue for your sensory evaluation testing!

Phone 610-564-9624
www.kmrresearchstudio.com

Lucas Market Research, LLC

Founded 1967 | 15 employees
Suzanne Lucas Echelmeyer, CEO

Celebrating 50 years of market research excellence, our redesigned facility boasts amenities for the most discriminating client and is conveniently located 15 minutes from STL Lambert airport. Centrally-located, our professional recruiting staff can deliver a diverse range of respondent demographics from the Metro-STL. Our 1,000-square-foot multi-purpose room is designed to comfortably and securely accommodate 30 testing stations, each equipped with a laptop and high-speed Internet. A fully equipped test kitchen and tenured, fully trained staff on product preparation protocol will deliver a seamless and cost-effective solution to ensure your project is a success.

Phone 314-344-0803
www.lucasresearch.net/

Michigan Market Research

Founded 2013 | 20 employees
Roxanne Naszradi, CEO

At MMR our staff is trained in food safety protocols and product testing, while having the experience and dedication to bring your project in quickly and on budget. Our kitchen was designed for efficiency and effectiveness, we have the appliances and 220v outlets for your project. Taste test rooms have viewing and can be configured in many layouts. Beverage research, QSR, prepared foods can all be easily handled in our kitchen with our equipment or feel free to roll in any custom equipment thru our 6-foot doorway. Run taste tests and follow-up focus groups simultaneously. Sensory research is our specialty!

Phone 248-569-7095
www.mimarketresearch.com

Opinions, Ltd.

Founded 1998 | 500+ employees
Chris Sluder, Vice President
Iris Blaine, Executive Director

Opinions LTD is a well-versed consumer product research company excelling in the areas of project management, study design/protocols, data collection and analysis. With 30 testing facilities, you can be assured you are more directly connected with your target consumer. Because we own and operate these facilities, we can adapt to last-minute requests. Standard methodologies currently requested are: central location testing; home use test; large group/multi-day testing; intercepts; and qualitative. If you work in areas of food and beverage; fragrance evaluations; cosmetic and beauty care; personal care; alcohol testing; luxury brands; or laundry and home care, then contact us for your next research project!

Phone 440-893-0300
www.opinionsltd.com

PVR Research, Inc.

Founded 1965 | 54 employees
Valerie Cansler, CEO

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

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

Q Research Solutions, Inc.

Founded 1992 | 70 employees
David Japhet, CEO

Q Research Solutions (Q) focuses on consumer and sensory research for CPG innovation. With over 30 years of expertise, we design custom research solutions, leveraging our state-of-the-art facilities and technologies, including the isolation of fragrance and aroma through qPOD® mobile technology that permits "in-use" experiences without cross-contamination. Q's Sensory Specialists have backgrounds which include food and beverage as well as household and personal care expertise with supplier and manufacturer perspectives. At Q, sensory research interfaces with all aspects of product development guidance from user interface to driving consumer preference to implicit measures of consumer opinion. www.qrsglobal.com

Phone 732-317-5850
www.qrsglobal.com/

TasteMakers Research Group

Founded 2010 | 15 employees
Andrea Poe, CEO

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

Phone 323-533-5954
www.tastemakersresearch.com

Tobii Pro

Founded 2001 | 130+ employees
Tom Englund, President

Tobii Pro is the global leader in eye-tracking. We offer both solutions and services that allow businesses to add attention measurement to their research portfolio. Whether you are testing shopper behavior, package designs, advertising concepts or user interactions, our innovative eye trackers and expert team of analysts provide you with an unparalleled vantage into the experience of the consumer. Contact us to learn what Google, Ipsos, Toyota, GfK and P&G already know – that eye-tracking from Tobii Pro provides compelling and actionable research insights.

Phone 703-738-1300
go.tobiipro.com/services

Names of Note

■ Home improvement retailer *Lowe's Companies Inc.*, Mooresville, N.C., has appointed **Jocelyn Wong** as CMO.

■ *Target Corporation*, Minneapolis, has promoted **Rick Gomez** to executive vice president and CMO.

■ Software firm *Internet of Things Inc.*, Toronto, accepted the resignation of **Richard Zhou** as director, who left to pursue other interests.

■ Customer experience company *MaritzCX*, Salt Lake City, has appointed **Michael Sinoway** as president and CEO. Sinoway succeeds **Carine Clark**, former president and CEO, who stepped down.

■ Alexandria, Va., political and public affairs research firm *Public Opinion Strategies* has promoted Vice Presidents **Jim Hobart** and **Micah Roberts** to partners at the firm.

■ **Peter Goldschmidt**, president of *Sandoz U.S.* and head of North America for Germany-based pharmaceuticals company Sandoz Inc., was court-appointed to Nuremberg, Germany, researcher *GfK's* Supervisory Board on Dec. 2. Goldschmidt's appointment completes the Supervisory Board after a vacancy arose when former chairman **Arno Mahlert** resigned on Sept. 13 and **Ralf Klein-Bölting** was elected as his replacement.

quirks.com/articles/2017/20170313.aspx

■ **Brian Krier** has accepted the position of marketing research director for *Ben Franklin Technology Partners'* Transformation Business Services Network. Ben Franklin Technology Partners' is a technology-based economic development program based in University Park, Pa.

■ *Complete Research Connection*, Columbus, Ohio, has added **Johnny McElroy** as facility assistant, a dual role that assists both the facility and project management departments.


Jian

■ Integrated data services firm *Norstat France* has appointed **Sorina Jian** as senior business development manager and **Sylvain Da Costa** as senior project manager for its Paris office.


Da Costa

■ **Jonathan Deitch** has joined social listening consultancy *Bakamo.Social*, based in Budapest, Hungary, as CEO and company director.

■ In Wilton, Conn., *Nielsen* has named **Nancy Ramsey Phillips** as chief human resources officer.

■ Los Angeles researcher *SoapBoxSample* has promoted **Dan Parcon** to vice president of operations and **Elinor Gaida** to vice president of research and analytics.

■ *MFour Mobile Research*, Irvine, Calif., has hired **Hristo Botev** and **Michael Dennis** as software engineers to join the labs and engineering team. The firm has also named **Celeste Blanchard** and **Holly Wong** to its operations team to contribute to the process of programming, fielding and data reporting for clients' research projects.

■ Chicago-based retail consumer insights firm *SPINS* has added **Kelly Marion** as senior vice president of customer experience.

■ Technology company *Acxiom*, Little Rock, Ark., has appointed the following to its audience solutions division: **Marc Fanelli** as group vice president; and **Chandos Quill** and **Karen Caulfield** as vice presidents of global data.

■ *LRW* (Lieberman Research Worldwide), Los Angeles, has promoted **Jeff Reynolds** to president and COO of SWHoldings, the holding company for LRW businesses. Additionally, **Sandy Wax** has joined LRW as executive vice president and COO, reporting to Reynolds.

■ *Simmons Research*, New York, has added **Lois Brennan** and **Grant Ligon** as account directors and has appointed **Jackie Anderson**, formerly vice president of custom research, as chief client officer.

■ The board of the *Market Research Institute International*, Ann Arbor, Mich., has elected **Jon Last**, founder and president of *Sports and Leisure Research Group*, as board president for 2017. He succeeds **Lisa Courtade**, executive director, global customer and brand insights for *Merck*, who becomes immediate past president. The board also elected **Jeffrey Henning**, CEO of *Researchscape*, as president-elect and **Michael Mermelstein**, executive vice president of *Nichols Research*, as treasurer. **Naomi Grewal** (Facebook), **Jonathan Lepisto** (dunnhumby) and **Bill MacElroy** (Socratic Technologies) were also elected, replacing retiring board members **Chuck Dodson** (ADM), **Roger Green** (RG+A) and **Cathy Scott** (Kimberly-Clark). Dodson, who previously served as president and ex officio subject matter expert, was elected board member emeritus. **Wayne McCullough** (College of Human Medicine at Michigan State University), also a past president, was elected ex officio subject matter expert.

■ **Carol DiBattiste** has joined Reston, Va., firm *comScore* as general counsel and chief privacy and people officer.

■ *Hanover Research*, Arlington, Va., appointed **Anil Prahlad** as chief content officer.

■ *20/20 Research*, Nashville, Tenn., appointed **Michael Steinberg** as executive vice president, business development for the company's technology and iModerate divisions.

■ **Joanne Van Vranken** has been named project and community manager for online panel *myCLEARopinion*.

■ **Mike MacLeod** has joined San Francisco researcher *AYTM* (Ask Your Target Market) as director of business development.

MacLeod

■ Marketing communications agency *ChizComm Ltd.*, Toronto, has appointed **Carine Sroujian** as director of marketing and communications.

■ Research consultancy *Market Strategies International*, Detroit, has promoted **Paul Hartley** to SVP, managing director of the technology and telecommunications division. He is assuming the role vacated by **Jean Malarkey**, who announced her retirement. Additionally, **Leigh Admirand** has joined the tech and telecom team as a senior vice president.

■ Chicago-based retail consumer insights firm *SPINS* has added **Anissa Buckley** to its product library team to accelerate products and services for North American brands and retailers.

■ Syracuse, N.Y., research firm *KS&R* has elected **Mike Bard** to its board of directors.

■ In New York, **Andrew Feigenson** has been named chief revenue officer for *Nielsen Catalina Solutions*.

■ Research consultancy *Incite* appointed three new hires in the last quarter of 2016. The San Francisco team added principals **Jenni Forbes** and **John Tearle**, who join from the firm's London headquarters. Incite also added associate **Caroline Aulis** to its team. Additionally, the firm's New York office is moving into a larger space in Manhattan by the end of Q1 2017.

■ U.K. technology and professional services firm *MARU Group* has appointed **Steve Brockway** as managing director of MARU Operations Group UK, while **Liz Boffey** has been appointed managing director of Maru/edr.

■ Netherlands-based customer insights agency *SKIM* has named **Christina Liao** as vice president of product development and innovation. She will be based in Atlanta.

Liao

■ In London, research and consulting company *Phronesis Partners* has appointed **Alan Gray** as VP - client success.

■ Customer agency *C Space*, Boston, has named **Jessica DeVlieger**, the company's senior vice president of sales and marketing, as president of C Space in the Americas. DeVlieger assumes the role previously held by **Howard Kogan**, who will take on the role of global COO of C Space.

■ In Washington, D.C., customer experience technology firm *EXLRT* has named **Karl Johnson** as managing director of U.S. operations.

■ Boise, Idaho, retailer *Albertsons Companies* has named **Narayan Iyengar** as senior vice president, digital marketing and e-commerce.

■ In the U.K., researcher *IRI* has appointed **Anthony Graham** as executive vice president of international solutions and innovations. Graham will replace **Lynda Gammell**, who has led the solutions and innovations team in Europe for six years and will return to the U.S. to take on a new role at IRI, leading the product management of IRI's Shopper KnowledgeBase.

■ Framingham, Mass., research and consulting services firm *IDC Government Insights* has appointed **Mark Zannoni** as research director for Smart Cities and Transportation within IDC's Smart Cities Strategies research service.

■ **Paul Allen**, executive VP at *Olson Research Group* in Yardley, Pa., will serve as 2017 president of the Pharmaceutical Marketing Research Group.

■ Research company *Precision Opinion*, Las Vegas, has added **Christopher Brogan** and **Kevin Unter** to the Precision Analytics and Consulting Division.

■ Honeoye Falls, N.Y., research firm *KJT Group* has appointed **Cindy McElroy** as research director.

■ In New York, researcher *Ipsos* has appointed **Amy Fenton** as CMO in North America.

■ *Complete Research Connection* in Columbus, Ohio, has added **Nathan Smith** to its project services team, assisting with project management and facility logistics.

■ Marketing software company *Bridg*, Los Angeles, has appointed **Mike Horowitz** as chief product officer.

Research Industry News

News notes

■ Feb. 1 marked the beginning of the 46th year that **Mid-Iowa Interviewing Inc.**, a focus facility and field service firm located in Des Moines, Iowa, has been in operation.

■ **Disney** was ranked the most intimate brand among Millennials, according to the *Brand Intimacy 2017 Report* by New York brand intimacy agency **MBLM**. Brand intimacy is defined as a paradigm that leverages and strengthens the emotional bonds between a person and a brand. Following Disney, **Amazon** and **Netflix** ranked as the second- and third-most intimate brands for Millennials. In MBLM's 2015 report, Amazon placed first, followed by **Apple** and **PlayStation**.

■ **Jeff Anderson Consulting/AH! Advertising**, a La Quinta, Calif., research and advertising firm, celebrated its 30-year anniversary on Feb. 1.

Acquisitions/transactions

■ Private equity firm **Thoma Bravo** has completed the sale of its portfolio company, Herndon, Va., enterprise software firm **Deltek**, to **Roper Technologies** for $2.8 billion.

■ **Nielsen**, New York, has purchased London-based company **VisualDNA** for an undisclosed sum to further its marketing cloud efforts. VisualDNA is an audience data business that supplies data to brands, agencies and publishers. The data is based on results of a psychographic personality test that has been taken by over 40 million people.

quirks.com/articles/2017/20170314.aspx

■ New York-based digital agency **Wunderman** has acquired a majority stake in **Pmweb Comunicação Ltda.**, a digital marketing firm based in Brazil. Under the leadership of CEO Tárik Potthoff, Pmweb will continue to operate independently as part of the Wunderman network.

■ Stamford, Conn., researcher **Gartner Inc.** has entered into an agreement to acquire all outstanding shares of Arlington, Va., technology company **CEB** in a cash and stock transaction valued at approximately $2.6 billion.

■ Investment firm the **Carlyle Group**, in partnership with the Indian Hill Group, has acquired consumer segmentation firm **Claritas** from **Nielsen**. Terms of the transaction were not disclosed.

■ Canada-based **CRC Research** has acquired **Research House**, a Toronto-based research agency specializing in focus group facilities and qualitative recruiting. The acquisition creates a qualitative specialty research company in Canada with offices and facilities in Toronto, Montreal and Vancouver.

■ Port Washington, N.Y., researcher **The NPD Group** has acquired **Nielsen**'s U.S. market information and research services for the book industry. The acquisition includes U.S.-based BookScan; PubTrack Digital; PubTrack Higher Education; PubTrack Christian; Books & Consumers; PubEasy; and PubNet. These services will be part of NPD Book, a new U.S. practice area. NPD will offer sales tracking for physical and digital books as well as buyer demographics and insights into print and digital preferences and trends. Nielsen will continue to own and operate Nielsen Book outside of the U.S.

■ Private equity fund **Stagwell Media LLC** has acquired certain custom research assets from New York-based **Nielsen**, including the **Harris** brand and the **Harris Poll**. Harris will relaunch as Harris Insights & Analytics, while the Harris Poll brand will remain unchanged. As part of Stagwell, Harris will focus on brand management, corporate reputation, consumer packaged goods, public opinion and consumer experience research. Terms of the deal were not disclosed.

■ **Reimagine Holdings Group**, a holding company focused on consumer insights and marketing services companies, has acquired Newton, Mass., research software solutions company **MarketSight**.

■ San Francisco-based loyalty marketplace **Ebates** has acquired Lexington, Mass., loyalty marketing solutions company **Cartera Commerce**.

■ Technology company **Cisco**, San Jose, Calif., has reported its intent to acquire San Francisco-based application intelligence firm **AppDynamics Inc.** for approximately $3.7 billion. AppDynamics will continue to be a led by CEO David Wadhwani as a new software business unit in Cisco's IoT and applications business.

■ E-mail data solutions firm **Return Path**, New York, has acquired Louisville, Colo., e-mail data company **ThreatWave**.

Alliances/strategic partnerships

■ San Diego-based **MediKeeper Inc.**

has reached an agreement with data warehouse service provider **Human Factor Analytics**, Russellville, Ark., to resell its platform and develop more detailed analytics about employee behavior and health risks that administrators can use to better manage employee benefits. As a MediKeeper client, Human Factor Analytics will resell MediKeeper's platform to its client base, which includes benefits brokers, employees and risk managers.

■ **Nielsen**, New York, and Tokyo-based **Video Research Ltd** have established a business partnership to create a standard and common digital audience measurement service for the Japan market. The partnership will measure the reach of content and advertising across Japan via PC and mobile devices to strengthen Internet audience measurement indices and advertising effectiveness services.

■ U.K. video insight firm **Voxpopme** has partnered with **Affectiva**, a Waltham, Mass.-based emotion recognition software company. Affectiva's Emotion AI will be integrated into Voxpopme's platform to enable the analysis of facial expressions within video feedback, coding it into emotion data. The integration allows researchers using Voxpopme's video insight platform to accurately measure and quantify human expressions of emotion in new and existing video feedback. Separately, Voxpopme has partnered with Warren, N.J., researcher Lightspeed to launch Video Answers in the Americas, Europe, Middle East and Africa. Video Answers allows clients to capture and analyze video open-ends at-scale and in real-time for survey research.

■ Japan-based panel and survey software firm **dataSpring** has expanded its U.K. and Thailand panels through a partnership with an unnamed market research firm. The partnership adds to dataSpring's existing coverage of panelists in Japan, China, South Korea, Taiwan, Hong Kong, Indonesia, Vietnam, Malaysia, Philippines and Singapore.

■ Chicago-based researcher **IRI** has entered into a long-term strategic relationship with Canada-based food retailer **Sobeys Inc.** Sobeys will use the IRI Liquid Data technology and its Unify visualization platform to integrate and report transaction, loyalty card, promotional and other data sources through a single platform

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across all of its retail food formats.

■ **Nielsen**, New York, has expanded its Connected Partner Program to include retail-focused companies such as **1010data**, **ciValue**, **Neogrid**, **Clear Demand** and **RangeMe**.

■ Canada-based online data collection company **AskingCanadians** has partnered with student and youth network yconic to provide access to the organization's youth-focused consumer insights panel.

■ India-based researcher **MRSS India** has partnered with the **Effie India 2016** awards. The awards, organized by The Advertising Club, honor effective marketing communications across India. MRSS India was asked to be the analytics partner and gain insight into the judges' views.

■ Merchandising and marketing solutions firm **OSI Creative** and point-of-purchase display firm **RP Creative Display**, both located in Irvine, Calif., have joined forces.

■ Boston-based social media analysis software firm **Crimson Hexagon** has integrated with business optimization platform **Domo**, allowing enterprises to analyze social media data alongside other business data, including sales data, financials, Web site analytics and more.

■ Salt Lake City-based customer experience software firm **MaritzCX** and Waban, Mass., research firm **Temkin Group** have formed a partnership to provide Temkin Group's Temkin Ratings within the MaritzCX Platform. Through the partnership, MaritzCX customers will have access to survey templates and be able to compare their Temkin Ratings index score against other companies.

■ Little Rock, Ark., technology company **Acxiom** has entered into a strategic partnership with New York-based mobile marketing firm **Verve**, allowing agencies and marketers to better reach consumers across mobile devices.

■ **Nielsen**, New York, has entered into a multi-year agreement with Dallas-based **AT&T** to include anonymized set-top box data from connected homes that subscribe to AT&T's DIRECTV and U-Verse services into Nielsen's local and national TV currency ratings services. The data from the AT&T set-top boxes, integrated with Nielsen's panels, will provide measurement that allows for a greater understanding of audiences and their viewing trends.

■ Atlanta-based e-mail marketing agency **BrightWave** and interaction management platform **Bluecore** have formed a partnership agreement to deliver products and services to retail marketing organizations. BrightWave will leverage Bluecore's platform to better use customer data across its client roster and will provide strategic, creative, campaign and technology services for Bluecore customers.

■ New York-based customer data platform **mParticle** has partnered with Reston, Va., firm **comScore**, allowing publisher clients to use comScore's audi-

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Association/organization news

■ In Washington, D.C., the **Insights Association**, a research and analytics organization created from the merger of **CASRO** and **MRA**, has launched. MRA and CASRO staff will continue with the new organization and are joined by recent hires Krista Vazquez and Jonathan Saxe. David W. Almy, who served as MRA CEO since 2010, will be CEO of the new association and Simon Chadwick, managing partner of Cambiar, will be chair of the association's board. CASRO President Diane Bowers will continue to work with the association on key projects.

Awards/rankings

■ Canada-based research and strategic marketing firm **CreativeWorks Marketing** has won Gold in the 2016 *MarCom Awards*, which recognizes creativity and excellence in the marketing and communications fields.

■ The MicroTracker solution by Boston-based market intelligence firm **InCrowd** has won the Best of Show Award as the *Best Technological Innovation of 2016* from the Fierce Innovation Awards: Life Sciences Edition Program.

■ **MRIA** fellow Michael Adams has been awarded the *Order of Canada* for his commitment to public service and contributions to the market research community.

New companies/new divisions/relocations/expansions

■ E-commerce intelligence firm **Clavis Insight**, based in Dublin, reported that it has doubled revenue, its team and the number of brands it serves in 2016. The company has expanded its operations in Dublin, London, Paris and Boston and has invested in the Asia-Pacific region with a growing team in Shanghai. Additionally, Clavis now serves customers in consumer electronics, cosmetics, consumer packaged and luxury goods in more than 30 e-commerce markets.

■ Los Angeles online community platform **Passenger** has changed its company name to FUEL CYCLE.

■ Health care and life sciences advisory firm **CMC Consulting Group**, Boston, has rebranded as Alira Health as a result of the company's expansion in the health care space.a

■ **Kantar Worldpanel**, based in the U.K., has extended its specialist panels measuring the out-of-home purchase and consumption of food and beverages to France, Brazil, Mexico and Thailand, taking its total read of the global out-of-home markets to 10 countries.

■ U.K.-based translation services firm **Language Connect** has expanded its U.S. operations with additional in-country staff. The expansion will be spearheaded by Mickey Brooks, who has joined the firm as senior vice president of sales for North America.

■ Health care data collection firm **SHC Universal**, New York, has reported a 15 percent increase in its panel site in the past year.

■ San Francisco-based software company **Salesforce** has opened a new office in Bellevue, Wash., which will house one of its engineering and innovation hubs. In the coming months, the company plans to double its workforce in Bellevue to nearly 500.

■ Following an investment from its parent company **Cello PLC**, U.K. audience intelligence platform Pulsar has merged with its sister company, qualitative research agency FACE, under one brand.

■ **Lightspeed All Global** has relaunched as Lightspeed Health, a practice of Warren, N.J., researcher Lightspeed, and includes a new logo and Web site. Jennifer Carrea, CEO, was appointed to lead Lightspeed's global health care practice in Sept. 2016.

Research company earnings/financial news

■ Chicago-based data science software and services firm **Civis Analytics** has raised $22 million in Series A funding led by Drive Capital, with participation from Verizon Ventures, WPP and Eric Schmidt, the executive chairman of Alphabet Inc. As part of the round of funding, Chris Olsen has joined Dan Wagner, Eric Schmidt and Tim O'Reilly on the firm's board of directors.

CALENDAR OF EVENTS

••• can't-miss activities

Centaur Media will hold its Insight '17 event on **March 8-9** at Olympia Central in **London**. Visit www.insightshow.co.uk.

The Quirk's Event – East Coast will be held on **March 21-22** at the Marriott Brooklyn Bridge in **Brooklyn, N.Y.** Visit www.thequirksevent.com.

ESOMAR will hold its 2017 MENAP forum on **March 21-22** in **Dubai, UAE**. Visit www.esomar.org.

PRYSM Group will host The B2B Marketing Expo on **March 28-29** at ExCel London in **London**. Visit www.b2bmarketingexpo.co.uk.

NMSBA will hold its Neuromarketing World Forum on **March 29-31** in **London**. Visit www.neuromarketingworldforum.com/en.

The Southwest and Northwest MRA will hold their Las Vegas Conference on **March 29-31** at the Paris Hotel and Casino in **Las Vegas**. Visit www.swmra.org.

KNect365 (IIR) will hold its Marketing Analytics and Data Science conference on **April 3-5** at the JW Marriott San Francisco Union Square in **San Francisco**. Visit marketing.knect365.com/marketing-analytics-data-science.

The Merlien Institute will hold its Qual360 North America 2017 event on **April 5-6** at The Gallup Building in **Washington, D.C.** Visit na.qual360.com.

The **UTA MSMR Alumni** will hold their annual Marketing Research Conference for the industry on **April 13** in **Arlington, Texas**. Visit msmralumni.org.

Empresarial will host its spring studies trade show on **April 20-21** at the Palais Brongniart in **Paris**. Visit www.printemps-etudes.com.

PMRG will hold its Healthcare Marketing Researchers Connect event on **April 24-26** at the Caribe Royale in **Orlando, Fla.** Visit www.pmrg.org.

The Merlien Institute will hold its MRMW North America 2017 event on **April 25-26** in **Chicago**. Visit na.mrmw.net.

Wakoopa will host the WHAT Conference, a behavioral data conference, on **April 25-26** in **Amsterdam**. Visit what-conference.com.

PAA will hold its 2017 Annual Meeting on **April 27-29** at the Hilton Chicago in **Chicago**. Visit www.populationassociation.org/sidebar/annual-meeting.

The Conference Board will hold its 13th Annual Customer Experience Conference on **May 4-5** at the New York Marriott Downtown in **New York**. Visit www.conference-board.org.

The Insights Association will hold an event titled, 'NEXT: Advancing Insights Through Innovation and Research,' on **May 9-10** at the InterContinental New York Times Square in **New York**. Visit www.insightsassociation.org.

The New England Insights Association will hold its Spring Conference on **May 18** at the Waltham Woods Conference Center in **Waltham, Mass.** Visit newenglandmra.com/event/nemra-neia-2017-spring-conference.

LIMRA will hold its 2017 Marketing Conference on **May 31 - June 2** at the Renaissance Nashville Hotel in **Nashville, Tenn.** Visit www.limra.com.

MRIA will hold its 2017 National Conference on **May 31-June 2** in **Toronto**. Visit mria-arim.ca/events-awards/national-conference.

The American Society of Trial Consultants will hold its annual conference on **June 8-10** at the Westin O'Hare in **Rosemont, Ill.** Visit www.astcweb.org/astc-conference.

EphMRA will hold its 2017 Annual Conference on **June 20-22** in **Amsterdam**. Visit www.ephmra.org.

KNect365 (IIR) will hold its 2017 OmniShopper conference on **June 20-22** at the Hyatt in **Minneapolis**. Visit marketing.knect365.com/omnishopper.

The Strategy Institute will hold its Digital Marketing for Financial Services Summit on **June 21-22** at The Westin Harbour Castle in **Toronto**. Visit www.financialdigitalmarketing.com.

NMSBA will hold its Shopper Brain Conference - USA event on **June 22-23** in **Chicago**. Visit www.shopperbrainconference.com/chicago.

The Merlien Institute will hold its MRMW Asia-Pacific 2017 event on **June 28-29** in **Singapore**. Visit apac.mrmw.net.

The Merlien Institute will hold its MRMW Africa 2017 event on **September 27-28** in **Cape Town, South Africa**. Visit africa.mrmw.net.

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

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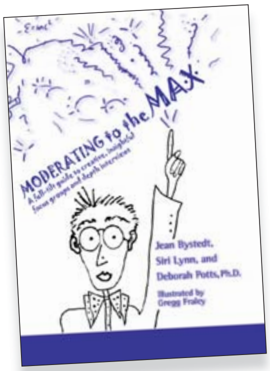

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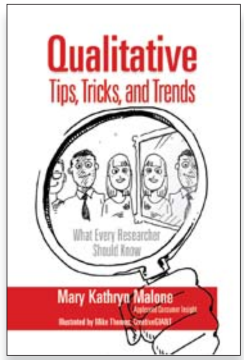

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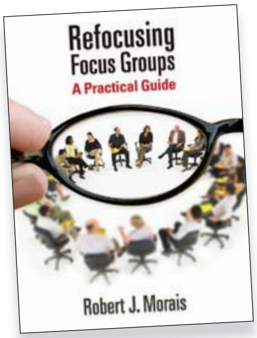

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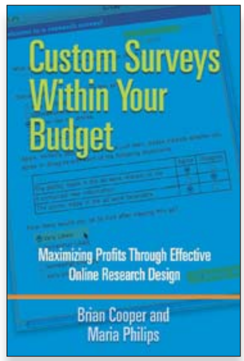

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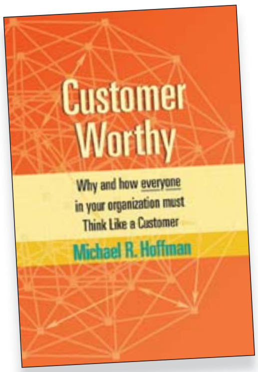

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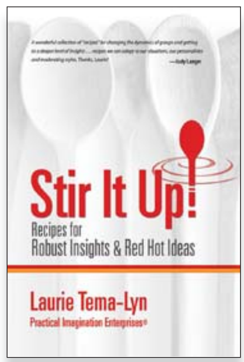

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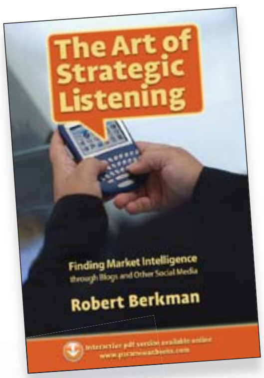

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10 minutes with...

Kerry Sette
VP, Head of Consumer Insights and Research, Voya Financial

"I think a big win for our team this past year has been elevating the importance of customer experience throughout the organization. Our brand is the promise we make to our consumers and the experience is how we keep that promise."

Prior to your position at Voya Financial you worked on the agency side. What are some of the challenges that you've faced moving to a client-side research position? What aspects have been rewarding?

Moving client-side after over 15 years in the agency world has been extremely refreshing although it was a huge shift for me. At first, I was a bit apprehensive about working in only one industry. However, my current work at Voya spans across many categories – retirement, life insurance, annuities, employee benefits, investment management – focusing on a variety of customer constituents, both B2B and B2C. Of course, each comes with a variety of business and research challenges, so it keeps me on my toes! In addition, Voya is a relatively new brand that has achieved tremendous success in terms of awareness growth. Currently, more than half of the consumers that know Voya recognize that we are a company who serves the retirement market. However, through data-driven insights we can continue to bring the brand to life in more ways that resonate with all of our target audiences.

At first, one of the biggest challenges in making the transition to the client side was the volume of internal meetings … now I know why my old clients were so busy! After being in my role now for over a year, I've learned that there is much more planning, preparation and collaboration with cross-functional teams.

Talk about a recent win for your team and what you learned from it.

Prior to Voya, I had quite a bit of experience working in CRM and building consumer loyalty models. However, I was never fully responsible for leading all customer experience programs across the entire client organization. I think a big win for our team this past year has been elevating the importance of customer experience throughout the organization. Our brand is the promise we make to our consumers and the experience is how we keep that promise. This starts with having our internal business partners recognize that the customer experience numbers in our Net Promoter Score presentations represent the cumulative effect of all aspects of the customer's journey. While most companies tend to optimize functions within individual departments, they can often lose sight of the end-to-end journey. However, all stages of the customer journey must consistently operate with the end-to-end customer experience in mind. This requires everyone to have access to that customer data as well as accountability and collaboration across different departments and functions.

You work with B2B and B2C MR, serving end clients, distributors and intermediaries. What advice would you give to someone starting out in a B2B2C researcher position?

First, never stop asking questions. Immerse yourself in the businesses by learning about the history of the category, government regulations, products, different levels of service you offer, pricing or distribution channels and learn what makes each constituent tick. It's also important to get your hands on as much data as you can about the population – both primary and secondary. Know your competitors' strengths and weaknesses and know their value proposition. Talk to as many colleagues as you can across the business, in different functions and at different levels.

Read the full interview at quirks.com/articles/2017/20170322.aspx.

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