QUIRK'S

For marketing research and insights professionals

DOES TECH CONNECT THE DOTS?

HIGHLIGHTS FROM THE FOCUSVISION 2016 ANNUAL MR TECHNOLOGY REPORT

PLUS Using semiotics to understand responses to ads

The power of creating brand memories

A twist on TURF

Applying biometrics to consumer product research

SPECIAL SECTION

Innovative Products and Services

ADVERTISING SECTION

26 Top Pharmaceutical Marketing Research Companies

Quirk's Marketing Research Review
June 2017
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Quirk's Marketing Research Review
4662 Slater Road | Eagan, MN 55122
651-379-6200 | www.quirks.com

Publisher • Steve Quirk
steve@quirks.com | x202

Editor • Joseph Rydholm
joe@quirks.com | x204

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

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

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

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

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

Sales • Lance Streff
lance@quirks.com | x211

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In addition to striving to be a top content provider in the marketing research industry, Quirk's also boasts comprehensive searchable online directories for 500+ research services and industries of specialization, including:

- online interviewing;
- focus group facilities;
- marketing research software;
- mystery shopping providers; and
- research panels.

This September we will once again publish our Researcher SourceBook – a directory of nearly 6,000 companies.

All these directories can be found online at quirks.com/directories.

••• coming soon

Quirk's research on researchers!

If you liked our research on researchers in the past, you may be anxiously awaiting Quirk's annual corporate research survey. For more than 30 years Quirk's has been collecting responses from our subscribers. Quirk's also conducts the largest annual salary and compensation survey in the industry. All of this data will be combined in a comprehensive Corporate Researcher Report and delivered in September with our annual Researcher SourceBook directory.

// E-newsworthy

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Coffee break: A supplier and a corporate researcher chat about their non-traditional paths to MR
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ResearchIndustryVoices.com

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Including emotional components in consumer engagement research
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Humility: the golden ticket in future job markets
goo.gl/MA20h9

4 questions all graduates should ask before starting the job search
goo.gl/00zq6L

Study looks at the challenge of employee burnout in 2017
goo.gl/WznwsZ

••• financial services research

In mobile wallets they trust

Consumers across the globe are more concerned with protecting their financial and payments information stored on a computer than they are with protecting this data when stored on a mobile wallet, according to a study, Global Consumer Survey: Consumer Trust and Security Perceptions, from ACI Worldwide and Aite Group.

The study of more than 6,000 consumers across 20 countries revealed that only 43 percent of consumers trust businesses, including restaurants and merchants, to protect their financial data – while surprisingly, more than 80 percent of global consumers generally believe their mobile wallet data is secure.

Across all regions, the top security concern is theft by computer hacking. Global consumers are not confident in firms' abilities to protect their stored data; only in the U.S., (54 percent), India (60 percent) and Thailand (51 percent) do consumers report at least 50 percent confidence that their stored data is well-protected. After experiencing fraud or a data breach, 65 percent of consumers indicated they would stop shopping with a given merchant.

Consumers are generally willing to interact with organizations to mitigate fraud, overwhelmingly preferring to engage with relevant organizations via mobile device. Three-quarters (75 percent) of consumers globally are very interested in receiving a call or SMS message to their mobile device to help mitigate fraud.

quirks.com/articles/2017/20170601.aspx

••• shopper insights

Online reviews retain their power

According to data from an online survey of 2,005 respondents conducted by San Francisco research firm Survata for SaaS platform Podium, Lehi, Utah, 82 percent of those surveyed indicated that the content of an online review has convinced them to make a purchase. Further, more than two-thirds of consumers (68 percent) are willing to pay up to 15 percent more for the same product or service if they're assured they'll have a better experience.

The survey, State of Online Reviews, also found that consumers aren't just looking at the star rating, they're actually reading and absorbing online reviews. Review content ranked as the most influential online review factor on whether a consumer would engage with a business.

Customers trust and regularly engage with online reviews. And they prove to be very influential: 93 percent of respondents said that online reviews have impacted their purchases. And yet, many businesses are missing out when it comes to engaging with customers and asking them to leave reviews. While data suggests that only 13 percent of SMBs ask customers for reviews, 77 percent of those surveyed said they would be willing to leave an online review if prompted by a local business.

By Joseph Rydholm, Quirk's Editor

Client-side researchers offer tips for vendor exhibitors


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Joe Rydholm can be reached at joe@quirks.com

With both of the 2017 Quirk's Events under our belt, we've been poring over the post-event surveys to find ways to do things better (and find out what we did right!) and it's been fascinating to read client-side researchers' divergent assessments of the behavior of the vendor exhibitors.

Some felt besieged by vendors, like minnows being stalked by sharks:

"The exhibitors were extremely aggressive this year, much more than last year. In general I couldn't attend a session without being accosted by someone wanting my business card and information. I am interested in meeting potential suppliers but I would like it to be on my own terms and through conversations that I approach as opposed to getting e-mails and being stopped everywhere in the hallways or in the session rooms."

"Vendors were a little too pouncy. Some butted in mid-conversation and [were] too vocal about their dissatisfaction about our objections to consider using them (such as, we already have vendors covering that type of research, etc.)."

While others did not…

"Overall, I appreciate that the exhibitors were not too aggressive and waited for me to walk up the booths. It makes it easier to absorb the options for sessions, booths and understand the layout when you arrive to the session."

Of course, you can't please everyone. We're all different, with different needs and expectations. But as I went through the survey comments, a few exhibitor best practices for interacting with client attendees came up and I thought I'd pass them along.

• Client-side researchers don't have research budgets burning holes in their pockets, so don't expect them to plunk down a check for that big project.

"As a client-side attendee, I did not feel attacked. But I do sometimes feel that some agency-side people are of the mistaken belief that I came [to the conference] with instructions to hand out RFPs or to ink deals worth a total of $10 million, with a stack of blank checks pre-signed by my CEO. I think agency-side people sometimes have no clue about how Fortune 100 companies procure research and the tremendous complexities involved."

• We had multiple comments, both survey-based and anecdotal, from client-siders who were ignored by vendor booth workers who were busy chatting with each other or staring at their smartphones. Trade show days can be very long but remember why you're there in the first place.

"Some exhibitors were rude, offensive and grumpy. If they don't put their best foot forward the event will not be good for them."

• Be present the whole time. The power outage midway through day two of the West Coast Quirk's Event was unfortunate but we were heartened by the "show must go on" attitude displayed by speakers, attendees and most vendors. Still, there were several comments about vendors who chose to pack up and leave early, despite the exhibit hall being open for another few hours.

"The power outage showed me which research companies can roll with the punches and which to avoid. Some companies damaged their image with how they reacted."

• Add some fun. From the very first Quirk's Event, we've urged exhibitors to get creative with their booth space to make the experience more enjoyable for everyone and attendees certainly noticed at this year's gatherings.

"The exhibit hall was fun and very good. Felt there were some partners there that were different than those that exhibit at other shows."

"I liked that there were interactive experiences from vendors. Don't change the importance of the exhibit floor. It is the reason I came to the conference and it delivered."

Overwhelmingly positive

In general, most of the comments were overwhelmingly positive on all fronts. In fact, between the two events, 95 percent of attendees said they would recommend the event to a co-worker. To further improve the experience for all, we're developing a set of exhibitor guidelines for the 2018 events. If you have some pet peeves or suggestions you'd like to pass along to the vendors, please e-mail me at joe@quirks.com.

quirks.com/articles/2017/20170602.aspx

ASK THE EXPERT

Expert answers to important research questions.

Isaac Rogers, CEO
20|20 Research
isaac.rogers@2020research.com
615-324-3783

What role do you think automation plays in research?

Automation of processes in MR is undoubtedly a positive evolution. It's given us the ability to offer more solutions, because workflows have become faster, simpler and more cost-effective. Automation allows our industry to streamline and "productize" our offerings, enabling us to help more brands and marketers with their common business problems. By making research simpler, we're opening ourselves up to new markets and finding opportunities to service smaller brands and marketers that previously considered MR out of their league due to cost, time or complexity. This net effect of automation is the real "next big thing" – as insights become easier to buy and consume, research becomes accessible to a wider audience.

David Agius, Founder/President
The Sentry Marketing Group
dave@sentrymarketing.com
972-987-1696

Can I use social media reviews in place of my mystery shopping program?

No. While social media has a place in an overall guest experience measurement strategy, it's the least-structured form of guest feedback and the hardest to derive actionable data from. A well-designed and -executed mystery shopping program will deliver reports that measure your team's performance against your standards. Because mystery shoppers prepare for their assignment by reviewing your standards, they're able to report on revenue-impacting items like the effort to suggestively sell add-on items or the accuracy of a receipt/guest check. It's unlikely that any customer on the receiving end of getting anything for free is going to post about it on social media.

Nancy Hernon, CEO
G3 Translate
info@g3translate.com
212-889-5077

What is the importance of culturally adapting surveys for target markets?

When conducting a survey in multiple markets, the questionnaire designer often tends to overlook the cultural relevancy of the content. Questions regarding income, education, brands or sentiment may need to be expressed differently in each market. Foreign-language surveys should both reflect the nuance of the original text and be culturally suitable, rather than offer literal word-for-word transfer. The most accurate survey results are obtained from a questionnaire that feels natural to the respondents so that their true sentiments may be captured and recorded for later analysis.

Have a question you'd like to have answered? Submit it to info@quirks.com.
Want your firm to be featured as an expert? Contact sales@quirks.com for more information. www.quirks.com/articles/2017/20170655.aspx.

IN FOCUS

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

// Survey Monitor

••• shopper insights

Millennials are big couponers

Only generation with YOY growth

A study from Livonia, Mich., media delivery company Valassis shows that 94 percent of Millennials surveyed are using coupons, versus 88 percent in 2016 – the only generation showing growth year over year. They're not alone: The study found that coupon use is holding steady, with 90 percent of consumers obtaining them from a variety of online and offline sources, a finding consistent across audiences, including various generations and demographic segments, such as multicultural consumers and parents.

quirks.com/articles/2017/20170603.aspx

Derived from an online survey of 1,000 consumers and focusing on shopping behavior for traditional consumer packaged goods categories, the findings from the 2K17 Coupon Intelligence Report (Influencing Consumers Along the Path to Purchase) explore how print, mobile and digital coupons and discounts impact shoppers before, during and after the point of purchase. Results indicate that today's consumers are "always connected" and becoming increasingly adept at incorporating both print and digital coupons as they plan their shopping activities.

Among coupon users, approximately 30 percent have increased their use of paper coupons (either from the mail or newspaper coupon book) and 36 percent have increased their use of paperless discounts (discounts received on a smartphone/mobile device and/or downloaded onto a store ID/loyalty card), further supporting coupon use from a multitude of sources.

When asked about their habits along the path to purchase, most consumers said they create a list prior to shopping and 84 percent use coupons during this process. Since more than 45 percent of consumers make CPG purchase decisions at home before their shopping trip, it is important for brands to reach them early in the planning stage. However, there is still significant opportunity to impact buyer behavior in store, with 86 percent of shoppers making a purchase based on a discount in the store. The study also reveals that the buying process does not end at the purchase stage, as 53 percent of consumers scan receipts with a mobile device to receive cash back and/or points, providing a ripe opportunity to increase brand loyalty post-purchase.

"The shopper journey is not defined at one specific point – the consumer can be influenced before, during and after the point of purchase," says Curtis Tingle, chief marketing officer, Valassis. "Our research indicates that there is an opportunity for brands to influence how shoppers plan, where they shop and the products they buy – which can be achieved by dynamically targeting the right audiences with a strategic combination of print and digital incentives."

Additional findings from the Valassis report include:

Preferred sources of coupons and discounts: Mail ranks as the most preferred way to obtain coupons, with


Solutions
Integrated Research Solutions
Audience Insights Solutions
Interactive Data Solutions
Interactive Data Solutions
Integrated Research Solutions
Audience Insights Solutions
Audience Insights Solutions
Integrated Research Solutions
Interactive Data Solutions
MindField internet panels

44 percent of consumers preferring this channel. Smartphones/mobile devices recorded the greatest increase, with 32 percent of consumers preferring this method versus 24 percent in 2016.

Brand-loyal shoppers can be persuaded: If the right deal presents itself, 79 percent of brand loyal consumers (self-defined) are influenced to buy a brand they wouldn't typically have purchased due to coupon influence.

Brands and marketers can influence consumers during multiple stages of their path to purchase. At home: 82 percent of consumers switch stores to take advantage of weekly specials and 67 percent decide which store to shop based on where they can use paperless discounts received via mobile devices. In-store: 81 percent of shoppers search for deals via in-store circulars while shopping and 51 percent make a purchase based on a mobile notification received in store. After purchase: There is a tremendous social currency post-purchase; among mobile coupon users, 79 percent share brand reviews, along with information about product savings, with family and friends following a purchase.

The study was fielded in the third quarter of 2016 in conjunction with a third-party marketing research firm with proficiency in Internet surveys. The sample was derived from an online consumer opinion panel and all participants were at least 18 years of age and living in the contiguous United States. Consumers were e-mailed an invitation to participate in the survey and were given three days to complete it. The survey was closed once 1,000 completed responses had been reached. The responses were weighted by factors obtained from national census data to provide appropriate representations of demographic groups at summary levels.

••• brand research

Trading on your reputation

The company behind the product matters

Based on findings from its annual U.S. RepTrak 100 rankings, Boston-based stakeholder measurement firm Reputation Institute (RI) has identified characteristics of companies that have formed effective bonds with consumers.

The top 10 firms in this year's rankings, in order, were: Rolex, Amazon.com, Sony, LEGO Group, Hallmark, Netflix, Kimberly-Clark, Hershey, Fruit of the Loom and Barnes & Noble. RI sees six key factors that define the top 10: their strength of familiarity; they identify with Millennials; their focus on CSR; active social media activity; a strong corporate brand purpose; and an inspiring, multichannel brand persona.

RI's RepTrak System measures the public's perception of companies on seven rational dimensions of reputation: products and services, innovation, workplace, governance, citizenship, leadership and performance. An "excellent" reputation is represented by an overall RepTrak Pulse score of 80 or higher. This year, 28 companies have a Pulse rating that falls into the "excellent" range. A RepTrak Pulse score of 70-79 is considered "strong," while 60-69 is "average." Outside of the top 28, the remaining 72 companies in the 2017 US RepTrak Top 100 all have a "strong" rating.

For 2017, Rolex emerges to displace Amazon as #1, while Lego and Hershey bounce back into the top 10, and Kimberly-Clark appears in the top 10 for the first time. In addition, seven of the top 10 are U.S.-based, while six can be viewed as "nostalgic, classic brands."

Based on more than 42,000 respondents who completed the survey in the first quarter of 2017, the survey quantifies the emotional bond consumers have with 800 companies and how these connections drive supportive behavior like the willingness to purchase a company's products, recommend the brand, invest or even work for the company.

"The bar for reputation is getting higher than ever before. The key to earning an excellent reputation for any company requires a strong focus on delivering high-quality products and services, and assurances of good governance coupled with a commitment to good corporate citizenship," says Stephen Hahn-Griffiths, RI vice president and managing director for the U.S. and Canada.

Kimberly-Clark appears in the top 10 for the first time (#7), increasing this year by 6.9 points to a score of 82.1. Gains across all dimensions of reputation, notably citizenship and products, helped to drive this move. The company's strong focus on CSR with key initiatives around sourcing sustainability and product donations, plus product innovation, also helped to drive Kimberly-Clark's "excellent" rating.

In the tech sector, Google was a big mover (to #17), increasing 4.6 points to a score of 80.6. The company saw a notable increase in the CSR dimensions (governance, citizenship and workplace) as Google focused on sustainability and donations to charity in lieu of employee bonus driving positive perceptions. Meanwhile the company continues to show strong gains in performance (+6.3) and leadership (+7.1) under CEO Sundar Pichai.

As part of an overall upward trend among "nostalgic, classic brands," Levi Strauss & Co. moved to #25 with an increase of 2.9 points to a score of 80.2.

Several quality-of-work initiatives, including increased paid parental leave and the CEO's accessibility, contributed to an impressive double-digit (+10.0) increase in the workplace dimension score.

On the downside, Samsung dropped from #3 to #63, after the company was challenged by its Galaxy Note 7 recall. Yet, the company's overall Pulse score remained in the "strong" range (77.8), highlighting that brand strength can provide a buffer during a crisis.

Other companies taking a step back in reputation this year include American Express, which saw its score drop by 4.4 points to 72.7, and Yahoo!, which saw one of the largest drops of 10.6 points to 60.8, as delays in the closing of Verizon's acquisition plus a series of data breaches served to undermine confidence in the brand.

"The most successful firms have a proactive, 360-degree focus on reputation, engaging its leadership to drive and actively communicate both product and corporate reputation initiatives," says Brad Hecht, RI vice president and chief research officer. "Whether it is successfully building reputation capital, as shown by Kimberly-Clark's positive reputational gains in 2017, or creating a reputation buffer, which served Samsung well during its 2017 crisis, having a strong reputation is critical to both ensure customer loyalty and maintain stakeholder trust."

When looking at reputations by sector, consumer companies remain the most highly regarded (due to relatability), while the energy sector is the weakest. The top ranked industries in RI's 2017 U.S. RepTrak 100 are: consumer; food and beverage; transport; automotive; airlines; industrial; retail; technology; information; pharmaceuticals; hospitality; services; financial; health care; telecommunication; and energy.

Across industries, the products, services and governance dimensions remain key drivers of overall reputation, while in technology, leadership is uniquely important vs. other sectors. Also retail, financial and hospitality are impacted by lower scores on innovation and citizenship, while hospitality gets average scores on workplace.

In terms of supportive behavior, the general public is more likely to support consumer companies, while the financial industry's lower scores for citizenship and governance detract from the support they receive.

Overall, industries that are viewed as open and transparent generate more support. Higher levels of transparency increase likelihood of "saying something positive," but transparency does not as readily yield higher reputation in the financial industry.

••• health care research

Health care data breaches try the patient's patience

Organizations need a response plan

One in four U.S. consumers (26 percent) have had their personal medical information stolen from technology systems, according to results of a survey from Accenture. The findings show that half (50 percent) of those who experienced a breach were victims of medical identity theft and had to pay approximately $2,500 in out-of-pocket costs per incident, on average.

In addition, the survey of 2,000 U.S. consumers found that the breaches were most likely to occur in hospitals – the location cited by more than one-third (36 percent) of respondents who experienced a breach – followed by urgent-care clinics (22 percent), pharmacies (22 percent), physician's offices (21 percent) and health insurers (21 percent). Half (50 percent) of consumers who experienced a breach found out about it themselves, through noting an error on their credit card statement or benefits explanation, whereas only one-third (33 percent) were alerted to the breach by the organization where it occurred and only about one in seven (15 percent) were alerted by a government agency.

Among those who experienced a breach, half (50 percent) were victims of medical identity theft. Most often, the stolen identity was used to purchase items (cited by 37 percent of data-breached respondents) or used for fraudulent activities, such as billing for care (37 percent) or filling prescriptions (26 percent). Nearly one-third of consumers had their Social Security number (31 percent), contact information (31 percent) or medical data (31 percent) compromised. Unlike credit-card identity theft, where the card provider generally has a legal responsibility for account holders' losses above $50, victims of medical identity theft often have no automatic right to recover their losses.

"Health systems need to recognize that many patients will suffer personal financial loss from cyberattacks of their medical information," says Reza Chapman, managing director of cybersecurity in Accenture's health practice. "Not only do health organizations need to stay vigilant in safeguarding personal information, they need to build a foundation of digital trust with patients to help weather the storm of a breach."

Despite the myriad breaches occurring, significantly more consumers still trust their health care provider (88 percent) and payer (82 percent) to keep their health care data secure than trust health technology companies (57 percent) or the government (56 percent) to do so. And while more than four in five consumers (82 percent) said they want to have at least some involvement in keeping their health care data secured, fewer than two-thirds (64 percent) said that they have such involvement today.

In response to the breach, nearly all (91 percent) of the consumers who were data-breach victims took some type of action. Some changed health care providers (cited by 25 percent), insurance plans (21 percent) or sought legal counsel (19 percent). Others took personal steps, such as changing login credentials (29 percent), subscribing to identity-protection services (24 percent) or adding security software to their computer (20 percent). Only 12 percent of data-breach victims reported the breach to the organization holding their data.

"Now is the time to strengthen cybersecurity capabilities, improve defenses, build resilience and better manage breaches so that consumers have confidence that their data is in trusted hands," Chapman says. "When a breach occurs, health care organizations should be able to ask 'How is our plan working' instead of 'What's our plan?'"

The findings reported here relate only to the U.S. portion of the survey. The full research, Accenture's 2017 Healthcare Cybersecurity and Digital Trust Research, represents a seven-country survey of 7,580 consumers ages 18+ to assess their attitudes toward health care data, digital trust, roles and responsibilities, data sharing and breaches. The online survey included consumers across seven countries: Australia (1,000), Brazil (1,000), England (1,000), Norway (800), Saudi Arabia (850), Singapore (930) and the United States (2,000). The survey was conducted by Nielsen on behalf of Accenture between November 2016 and January 2017. The analysis provided comparisons by country, sector, age and use.

••• shopper insights

Set it and forget it

Who's buying products and services via subscription?

Research from Cincinnati-based payments processer Vantiv shows the growing disparity in subscription-spending habits from generation to generation. While Gen Xers and Baby Boomers aren't signing up at a rapid rate, Millennials, more than 70 percent of whom have a product subscription and 89 percent a service subscription, see subscriptions as purchasing made easier at a time when they're bombarded with an abundance of choice.

As subscription spending continues to grow for services like groceries, household items and beauty products, Vantiv's research, conducted by San Francisco research firm Socratic Technologies, shows less than half of Gen X consumers and less than 20 percent of Baby Boomers and retirees use subscription-based products. (Socratic Technologies surveyed 500 people around the United States in partnership with Vantiv's market insights organization, Vantage Point.) For service subscriptions, it is much higher, coming in at 67 percent for Boomers and 78 percent for Gen Xers. Millennials, on the other hand, seem to like the convenience of subscription services, having things shipped to them on the spot, without having to reorder every week or every month, and the ease of a service subscription. They also have an overall greater interest in subscribing to products or services in the future to which they do not already subscribe.

"E-commerce merchants must seriously consider subscription strategies to build loyalty," says Bill Cohn, senior product leader, e-commerce at Vantiv. "The business model provides many advantages for merchants. First, customer lifetime value to a merchant typically goes up. A consumer can click 'buy' once and get razors or beauty products or coffee pods shipped every month with no further thought or action. Second, services that would be costly if billed in one lump sum become more affordable. This is particularly important for Millennials, who have the strongest appetite for online services but the tightest cash flow compared with previous generations. Third, a growing recurring revenue stream is a good way to increase the value of your company. So for smaller businesses or startups, a subscription model provides a great opportunity to compete with larger incumbents – think for example of groceries and the growing online/subscription meals delivery services."

While many e-commerce merchants may take this generation gap in spending as a sign they need to appeal to older generations, those segments of the population aren't likely to budge. Vantiv's research shows that 77 percent of consumers who don't currently subscribe to any products are unlikely to do so in the future. For online merchants, this data means it's time to double down on the Millennials.

INNOVATIVE PRODUCTS & SERVICES

Methodologies, techniques and technology are rapidly changing in the marketing research and insights industry. New products and services are being released at an ever-faster pace. How can you keep up on what is new? Quirk's has you covered. In this section, you will find some of the newest and most innovative tools and services to keep your research up to speed. From the latest in software, technology, methodology and services, these are the products and service you will want to know about.

SHAPIRO+RAJ

Not all loyalty is created equal

The benefits of loyal customers are well-known: loyal customers have higher retention, give a larger share of their category spend to the company and are more likely to recommend the brand to others. However, the S+R Brand Loyalty Monitor (BLM)™ demonstrated that across categories anywhere from 30 to 40 percent of frequent purchasers of products or services report that they are actively looking. Is this loyalty?

Measures of frequency of purchase or repurchase intent or recommendation or satisfaction are not sufficient to inform us about the quality of loyal behavior and how to manage it. The BLM™ is a fresh perspective on the quality and nature of loyal behavior, opening up new avenues for sustainable growth.

A customer-centric, data-driven tool, the BLM™ uses a multiple indicator model to not only assess how loyal customers are but also provide an understanding of how customers experience the brand and identify the rational and emotional drivers underlying the bonds customers develop with their brands. Companies leverage these insights to amplify those connections to strengthen their franchise.

The BLM™ helps companies understand their market and the different needs of their frequent customers through knowing the quality of loyalty segments and guides them in enhancing the experience and relationship bonds of their customers to create sustainable relationships.

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INFOTOOLS

Smarter, faster research – anytime, anywhere with Infotools Harmoni

In today's world of big data everywhere, businesses ignore the numbers at their peril. The challenge to date has been that most businesses simply don't have access to the smart tools they need to deliver the data-driven insights they require.

Harmoni, from marketing research software and services provider Infotools, is set to change that forever. This cloud-based platform delivers actionable intelligence and insights quickly and consistently, letting you drive your business faster and smarter. And it's delightfully easy to use!

Because Infotools Harmoni is an intuitive software platform that lets you process, analyze and visualize your market research data, you spend a lot less time preparing data and a lot more time getting the answers you need. Bring your data sources together and transform them into beautiful, sharable stories that deliver powerful insights to help you and your business make smarter decisions.

Infotools Harmoni distils more than 25 years of world-leading research smarts into a single cloud-based platform you can access anywhere you have a connection. Need smart insights to drive your business? Get in touch for a demo and see the future of market research for yourself.

www.infotools.com

nielsen

Nielsen Consumer Neuroscience: Taking the guesswork out of creative

Creating a successful advertisement is complex. It requires the right ingredients, including the right creative, the right audience and the right media. Without these elements working together, a campaign isn't likely to succeed. Despite progress using modern tools for campaigns, evaluating creative is only beginning to thrive.

Our understanding of the brain has grown exponentially over recent years. Leveraging this understanding, Nielsen Consumer Neuroscience's Video Ad Explorer (VAE) delivers the most comprehensive understanding of consumer response, evaluating non-conscious processing of attention, emotion and memory – thereby capturing insights we may otherwise miss with self-report alone.

VAE integrates a complete suite of neuroscience technologies, including EEG, biometrics, facial coding and eye-tracking – combined with self-report – to allow clients to pinpoint areas within a creative execution for optimization and compression with second-by-second granularity.

We don't think of ourselves as ad testers, we're ad builders, collaborating with brand teams to keep what's great and to improve upon what's not. And we've shown that it works. In a major validation study, in collaboration with Nielsen Catalina Solutions and CBS, we tested 60 CPG ads from 20 different product categories. The study showed that the integration of multiple neuroscience measures results in up to 77 percent explanatory power of in-store sales – and adding self-report explains up to 84 percent – providing marketers with unprecedented research potential.

www.nielsen.com/consumerneuroscience

The Holy Grail of marketing insights: predicting behavior

SHAPIRO+RAJ

"The trouble with market research is that people don't think how they feel, they don't say what they think and they don't do what they say." — David Ogilvy

When it comes to predicting behavior, market research hasn't always been great at it.

Traditional market research methods alone fail at predicting future behavior. These methods do a great job of assessing likability but not the ability of an idea or concept to impact behavior, leading our marketing clients to ask, "Why are the ideas that people say they liked in research not performing as expected in-market?"

Behavioral economists have been studying non-rational predictors of behavior for decades, and as market researchers, we have a lot to learn from them regarding three key issues.

1. Heuristics: People make decisions using fast (System 1) thinking, often aided by heuristics, rather than slower, more deliberative, rational (System 2) thinking. Yet traditional market research methods totally overlook System 1 thinking.

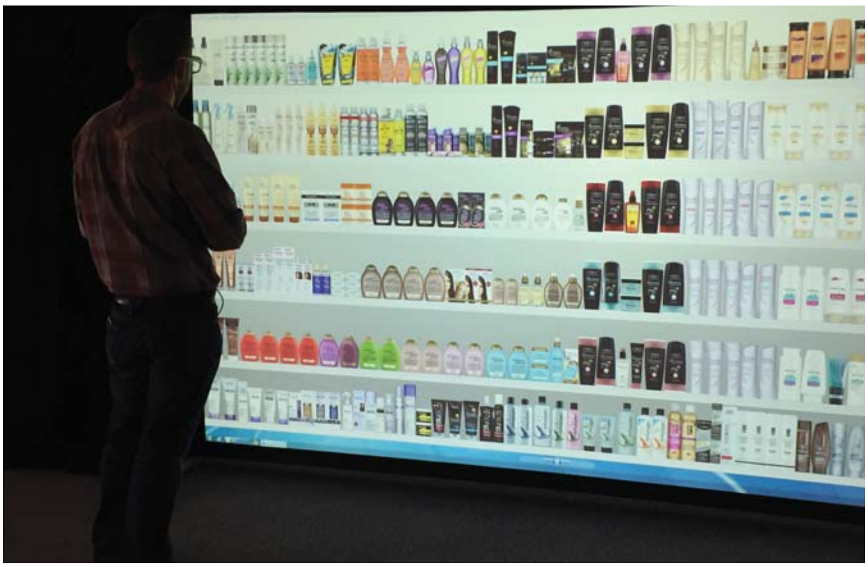
2. Context: People do not think in terms of generalities or percentages of time. They make decisions on a case by case basis, so we need to ask about behaviors in very specific contexts.

3. Stimulus: Too often we have not done the work to create stimuli that reflect the heuristics and underlying needs and desires that are at play. We test product or concept ideas and then overlay the emotion later on. That's not how it works in real life.

We have a better approach that accounts for the major role heuristics and emotional influences play in decision-making. It's called BehaviorImpact, a superior approach that offers:

- More understanding of the ideas that will drive choice and behavior
- More context that will translate to real-world impact
- More coordination between ideas and execution to improve ROI

www.shapiroraj.com



informed decisions GROUP

Mobile Virtual Aisle offers virtual shopping experience

Informed Decisions Group's Mobile Virtual Aisle is an in-store experience that enables life-sized, in-context learning while being portable to anywhere in the world. Shelves, aisles and entire stores can be created for testing. Using our mobile eye-tracking and qualitative interviews, IDG can extract immediate insights from shoppers' interactions with the aisle.

By integrating quantitative data from IDG's mobile eye-tracking or interactive volumetric conjoint with qualitative insights from post-shop interviews, concise and effective category decisions can be made quickly and with full confidence.

The Mobile Virtual Aisle can be leveraged to test and optimize packaging, planograms and signage in a life-sized real-world environment. Informed Decisions Group can also leverage the Mobile Virtual Aisle for life-sized, interactive conjoint research yielding a more realistic exercise than on a computer monitor.

This is a 4K, high-resolution, rear-projection system that produces digital images with cinematic reality and color quality. The rear-projection screen surface uses a resolution of 4096 x 2400 and produces a minimum of 33.3 pixels per inch. The image reproduction of this system displays realistic shelf sets for virtual shopping experiences.

- 6 x 10-foot portable screens for life-sized, scaled projections
- Rear projection to eliminate shadows
- Ability to simultaneously test multiple design options and easily modify test stimuli
- Faster results than in-market testing

www.idg-consulting.com/virtual

iM insights in marketing
Connecting people to brands.

Firm offers innovative, custom qual and quant solutions

Insights in Marketing is a marketing research firm that empowers brands to make moves inspired by the consumer voice. Combining decades of experience with an innovative approach to research, Insights in Marketing creates custom quantitative and qualitative solutions for every client. Led by Ron Raskin, owner and president, the team empowers brands to make bold, strategic moves always with the consumer top-of-mind. Our customized research approaches leverage proven methodologies and techniques so you always get the in-depth and actionable insights you need. Curiosity and intuition drive each member of the team to dig beyond the surface and uncover the real feelings and opinions of target consumers. With experience across the consumer landscape, we know exactly where to go and what to ask to find the insights and solutions your business needs. As detailed elsewhere in this special section, we now offer our new IIMPronto quick-turn qualitative and quantitative research solution for when traditional research timelines just won't work; from screener to report with insights and recommendations in just seven days. 2017 is poised to be the year that Insights in Marketing's team helps even more globally known brands across industries to ensure they capture the consumer voice.

www.insightsinmarketing.com

Ameritest®
see what others don't

Understanding banner ad performance in a snap

Ameritest is proud to introduce BannerSnap, a fully automated banner ad pre-test designed to meet the fast timelines and strict budgets of most digital campaigns.

BannerSnap measures ad performance in a controlled environment that mimics the actual consumer experience, while delivering richer and more actionable insights than monitoring online metrics can provide.

BannerSnap combines outcome-based metrics of ad breakthrough and impact with diagnostics including Ameritest's patented Picture Sorts® to deliver insights that:

- predict how creative will perform in-market; and
- provide guidance for creative optimization.

Mention this entry in the Quirk's Innovative Products & Services section to receive introductory pricing.

Contact us at info@ameritest.com.

BannerSnap

www.ameritest.com

Ascribe Surveys launches insights platform with sample powered by Google Surveys

ascribe
words to wisdom

Ascribe recently launched Ascribe Surveys, powered by Google Surveys, to deliver a robust, efficient and cost-effective means to reach consumers around the world, as well as collect and analyze their feedback.

Integrated within the Ascribe Intelligence platform, which combines an easy-to-use survey tool with advanced verbatim analysis techniques, it enables market researchers to reveal immediate insights from customer feedback and allows them to make better, more-informed decisions through a deeper understanding of their customers and markets. Users gain valuable business insights through consumer-centric research, including:

- pre-test a marketing campaign;
- prioritize new product initiatives;
- gauge a reaction about a recent event; and
- track brand awareness.

With expanded panel-targeting capabilities that provide access to validated samples in key markets, including the United States, Australia, Brazil, Canada, Germany, Italy, Japan, Mexico, Netherlands, Spain and United Kingdom, Ascribe Surveys is one powerful insights platform.

Ascribe Surveys addresses the industry need for shorter, mobile-enabled surveys. Consumers want to give feedback on their terms, which can often include an aversion to long surveys and an on-the-go approach. They simply want to type or say their feedback and move on, and they have an expectation that the company providing the product/service will take action based on their comments.

"This new insights platform accommodates a scope of research activity that is virtually unheard of," says Ascribe CEO, Rick Kieser. "Market researchers can now seamlessly tap the power of Google's validated global sample combined with an easy-to-use survey tool and advanced verbatim analytics – no other product can do this today with a single login."

"We're excited about collaborative opportunities on our platform that bring the reach, quality and speed of our representative sample to third-party research products," explains Dylan Lorimer, product manager, Google Surveys.

Ascribe Surveys and Ascribe Intelligence are SaaS-based online tools that are available now to researchers across the world.

To learn more or request a demo, visit ascribesurveys.com or goascribe.com

Red Centre Software
Data Comes Alive

New solution for research on tablets and smartphones

Over the last 12 months, RCS has made a significant investment in the design and development of a true and tested mobile version of our unique Ruby Laser browser product.

We are proud to announce the release of RubyGo – a groundbreaking new solution for market research data on tablets and smartphones.

RubyGo (like its older brother, Ruby Laser) again sets the standard in market research for online access to data. It was built from the ground up for the intricacies of MR data (not just an RDB), with comprehensive crosstabulating (real crosstabs, not just pivot tables) and charting, along with Excel-based dynamic dashboards.

No more jumping through hoops and wasting time creating complicated dashboards. RCS online products use standard Excel spreadsheets linked to live Ruby Tables! With live links, you can drill down and filter on the fly, online. No learning new things – Excel's excellent graphics make for professional presentation of the results.

With RubyGo we offer you the full and unique functionality of Ruby Laser in the palm of your hand.

There are two apps: RubyGo (best for tablets) and RubyPocket (best for phones). They are both free on the app stores. To try them out, download the app and use the following credentials: agency: rcsreporting, username: guest, password: guest.

www.redcentresoftware.com

SHAPIRO+RAJ

Big qual – digging for insight gold in historical data

Every year, market researchers collect piles of data, both quantitative and qualitative. In most cases, the researchers will tabulate the data, code it, count it, create a report and ship it off to the client, nicely gift-wrapped with a bow on top. For quantitative studies, the actual data is usually boxed up and then put away in cold storage afterwards. For qualitative studies, the data may not even exist outside of the moderator's head or a notes sheet.

What if that data could always be available for analysis, even longitudinally? Not only that, what if all that data could be analyzed using state-of-the-art computational techniques to unearth insights that may have been missed when the original data was considered?

Our Client Learning Center (CLC) is a technology solution that solves both these problems by allowing researchers to load all their historical research data into a specialized big data store that allows on-the-fly analysis, aggregations and visualizations.

In addition, a plethora of machine learning algorithms made available out-of-the-box allow qualitative data to be evaluated from different angles, very quickly and with very little human involvement. Our toolbox of automated analyses includes the ability to identify brands and products, tag emotional content, measure sentiment and categorize content into major themes, just to name a few and with more on the way. Armed with this growing arsenal of qualitative tools, researchers can let our platform do the grunt work so they can do what they do best: derive game-changing insights for some of the biggest businesses in the world.

The self-service design of the CLC allows users to have 24/7 access to their data for evaluation as questions arise. The democratization of information in this manner creates boundless opportunities for continuous learning for market researchers and their end clients.

www.shapiroraj.com

Idea Mill™

www.trchome.com

TRC

Rigorous solution to ignite your ideation

TRC's agile and inexpensive idea generator – Idea Mill™ – allows consumers to have a seat at the brainstorming table early on in an organization's ideation process.

The product is designed to inject fresh new thinking by offering a few dozen validated ideas generated by consumers, while using a proprietary gamification technique.

www.trchome.com

Make product optimization and forecasting more affordable

Blueberry Marketing and Sensory Research has introduced PinPoint℠, an affordable product optimization and forecasting solution for concept, product and marketing mix analysis. The methodology benchmarks against the current marketplace (rather than normative data) for easy application in global markets and newer product categories. It incorporates a scenario-planning tool for flexible forecasting and a sensorial analysis for product feature prioritization.

www.blue-berry.com

Boost health care qualitative with QualEDGE℠

Reckner Healthcare, a pharmaceutical and health care fieldwork provider, has responded to the industry trend merging of qualitative and quantitative research with its new QualEDGE℠ program. QualEDGE℠ delivers online enhancements to the company's qualitative recruiting program, enabling researchers to manage pre/post surveys, patient charts and insights boosts online, thereby enhancing speed, efficiency and analysis of health care qualitative studies.

www.recknerhealthcare.com

Social Adaptive Recruiting: Next-generation qualitative recruiting

Our unique proprietary tools help us find fresh, qualified and hard-to-reach respondents based on their actions and behaviors. Our Social Adaptive Recruiting methods allow us to tap into behavioral data available at our fingertips via social channels.

Here's how it works.

First, we listen and search social data:

- We set up a social listening campaign via our proprietary Adaptive Listening™ tool. That allows us to listen via the top social channels and selectively target respondents based on their behavior, demographics, geography and interests.
- We also target Facebook users via our proprietary tool based on their "likes," interests and demographic profiles.

How we make contact:

- We reach out to our identified audience directly through the social channel where we find them, with a personalized invitation to fully screen them to see if they qualify to participate and share their thoughtful feedback.
- Qualified pre-screened respondents are validated by phone by our professional recruiters. We have found that making a personal connection with respondents is key to ensuring high-quality, committed participants.

We end up with authentically qualified, hand-selected, articulate, fresh respondents.

Talk to us about how our innovative recruiting tools can help elevate the quality of insights on your next project.

shapiroraj.com/qfp

DIY sample-buying portal puts users in control

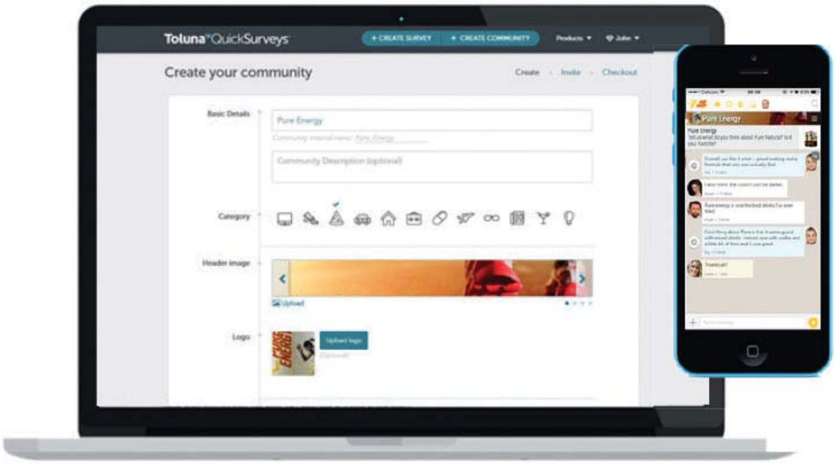
Feedback from researchers and sample buyers in the market research industry points to continued constriction of timelines and resources. This has led industry innovator and global online sample provider Research For Good to launch The Sampling Place.

The Sampling Place is a do-it-yourself sample-buying portal that gives users complete control over their own sampling process.

The always-on portal lets users calculate feasibility using hundreds of pre-programmed data points from Research For Good's respondent reach of over 16 million people. The clean, robust design easily lets the user launch, monitor and make real-time adjustments to projects on their own schedule. Autonomous and intuitive, The Sampling Place is built upon Research For Good's source-agnostic sample methodology and industry-leading breadth of recruitment. Sample buyers now have access to the broadest cross-section of the online population, with the nuanced sampling controls needed to ensure high-quality insights from thoughtful and engaged respondents.

With every survey complete purchased through the platform, Research For Good will make a corporate donation to charity partner Action Against Hunger. Driving market research technology forward while engaging corporate funds in social causes puts Research For Good at the forefront of doing good in our industry. Research For Good is currently accepting additional beta test users. Discover more on their Web site researchforgood.com or e-mail at TheSamplingPlace@ResearchForGood.com

researchforgood.com



Toluna QuickCommunities™

Build digital communities in minutes with Toluna QuickCommunities™

We know that having the ability to go beneath the surface of consumer insights to uncover what emotions and motivations drive consumer behavior is invaluable to your business – but being able to do this quickly is not always easy.

Toluna QuickCommunities™ provides a do-it-yourself, quick-turn solution to help you cost-effectively build digital insight communities faster than ever before. With an intuitive wizard offering an array of customization options, you can create digital communities in minutes that are in synch with your brand guidelines to address short-lived, event-based or ad hoc needs.

Recruitment is fast and easy with direct access to Toluna.com, the world's largest social voting community of over 13 million consumers across 68 countries.

Try QuickCommunities™ today and see how easy it is to create your own brand advisory board of consumers and prospects in just minutes.

corporate.toluna.com

Toluna™ In touch with people

brinc branded research inc.

Directly engage social communities for sample

Branded Research, a San Diego-based online sample provider, has launched a new recruitment service leveraging Facebook for a direct connection to panelists. Over the past decade, Facebook has built the most complete consumer and business database available. With our socially-validated and secure approach, panelists are directly targeted and recruited for surveys from Facebook's 1.8 billion members. Tapping into Facebook provides precise targeting and profiling information including:

- demographics
- interests and hobbies
- location
- behaviors and psychographics

Opinions and insights from our panelists enable data-driven decision-making our clients can trust. A relevant, quality conversation elicits a quality response.

brinc.co

Get into the 'whys' with Quester's AI-backed quant-qual approach

Quester's unique research design applies the principles and methods of sophisticated quantitative research and simultaneously leverages an artificial intelligence-backed moderator to deep-dive into the "whys" with every respondent.

We start by listening to your research objectives, hypotheses and business goals. Armed with that information, researchers design a questionnaire leveraging the best of both quantitative and qualitative questions. Quester's designs have fewer boundaries because we create questionnaires more representative of natural conversations. Respondents engage in what appears to be a traditional online or mobile survey. But as they type in their answers to open-ended questions, the software is analyzing every word. It processes multiple layers of intelligence in real-time to determine unique open-ended, follow-up questions. These probes are grounded in uncovering further definition, elaboration, implication and rationale.

We'd love to learn about your research challenges. To learn more about us, visit Quester.com/video or call 877-232-1005.

Quick-turn qual and quant with IIMPronto

The time it takes to gather and analyze research is one of the main reasons many brands don't test new concepts and packaging before launch. The pace of business is moving faster than ever, but many research firms are still taking weeks or even months to provide consumer insights. IIMPronto is a new solution developed by Chicago-based research firm Insights in Marketing (IIM) aimed to solve this problem. With quick-turn quantitative and qualitative research, the team delivers consumer insights and feedback in just seven days, including a report with insights and recommendations.

Whether it's identifying the lead concept for a new product launch, determining which package design best appeals to consumers, which message best resonates with consumers or what attitudes and perceptions consumers have regarding a topic, IIM strives to ensure every brand decision can be inspired by the consumer voice.

IIM has developed a simplified screening process that enables us to:

- recruit up to 30 qualitative respondents;
- execute up to five quantitative monadic cells with 200 respondents/cell; and
- recruit valued and diverse consumer groups.

To find out more about IIMPronto or schedule a free consultation, visit www.insightsinmarketing.com/iim-pronto.

COOL TOOL

Affordable neuromarketing solution

NeuroLab by CoolTool is the most comprehensive and affordable neuromarketing solution.

It combines eye-tracking, EEG, emotions measurement and mouse-tracking. All of them are easily integrated into surveys. It enables researchers to cross-analyze self-reported data with NeuroLab results.

Fans of automation will find this solution very convenient as results are delivered in real-time and in automated reports.

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HealthStrategiesGroup
AccessExpress

Quick, credible answers to time-sensitive questions

Sometimes you need answers – fast. But fast shouldn't mean you need to compromise on quality.

Access Express is a self-service custom research tool for biopharmaceutical market researchers that leverages Health Strategies Group's robust panel of providers and payers to provide answers to your questions in one week's time.

Simply log on to an easy-to-use portal, select your target respondent roles, set your sample size preferences and submit five-to-10 questions. Sit back and we'll do the rest. Your results will be available in six business days.

The entire research process – including survey programming – will be managed by Health Strategies Group's experienced in-house research team. Health Strategies Group has been the leader in market access market research for over 20 years, so you can be confident in the quality of Access Express results. Now that's market research that moves you ahead.

To learn more, visit healthstrategies.com/accessexpress

Using TURF to find something for everyone

| By Mark Travers

snapshot

A chewing-gum example helps author Mark Travers illustrate how a variation on TURF works better as a revenue maximization tool.

To talk about TURF is, in some sense, to date yourself. Indeed, anyone who has been in marketing research long enough has had at least some exposure to the analysis. Growing out of the days of old-school media-buying, TURF was introduced as a way to maximize the effectiveness of advertising campaigns. TURF helps figure out, for instance, how advertisers should spend their ad budgets to reach the maximum number of target consumers.

Nowadays, TURF is used for a lot more than just media buying. TURF is commonly applied to situations where, say, a juice manufacturer wants to optimize its flavor line to appeal to the widest number of consumers. Or where a credit card company wants to figure out what set of card options offers maximum consumer reach.

In short, any time the marketing objective is to determine how products, concepts and advertisements can reach the widest number of would-be consumers, TURF is a go-to analytical strategy.

And there's good reason for TURF's staying power. It is an intuitive technique that yields easy-to-digest and definite solutions.

There is, however, one fatal flaw in many common applications of TURF and it has to do with the underlying psychology of consumer decision-making. While TURF figures out which product sets or advertising channels cover the widest number of consumers (but covers them only once), there are many occasions when revenue is maximized by reaching fewer consumers more than once with multiple products. In other words, there's value in offering more than one product that appeals to the same consumer or running multiple advertisements seen over and over again by the same consumers. And this taps directly into the psychology of consumer choice.

This article proposes an advancement to the TURF algorithm that quantifies the value of duplicating consumer reach. Comparing this modified TURF procedure, which I refer to as TURF-War, against a traditional TURF analysis, my goal is to show how your organization could be leaving revenue on the table by not reaching the same consumers more often and with more products.

The crux of TURF analysis is the idea of nonduplication (TURF, after all, stands for total unduplicated reach and frequency). Imagine you are a gum manufacturer and you produce five different flavors of gum. You have just opened a relationship with a retailer, who has requested three flavors of your gum to put on its shelves. How do you figure out which three flavors to send? TURF first identifies the flavor that appeals to the most people. Then, it looks only at the people who aren't covered by this flavor and identifies the gum that appeals most widely to just those people. Then, the algorithm looks at the remaining people – not covered by either of the previous two flavors – and determines which flavor appeals most widely to them.

By conducting a TURF analysis, you can be guaranteed that you have, in a sense, "something for everyone."

quirks.com/articles/2017/20170605.aspx

Maximize revenue

Typically, the core business objective of a TURF study is to uncover product sets that maximize revenue. By identifying sets that appeal to the widest number of target consumers, TURF analysis sets off in this direction. But TURF is a consumer coverage optimizer, not a revenue or product share optimizer. This is where TURF-War comes into play.

To understand why it's important to keep a focus on revenue when undertaking a TURF study, let's continue with our gum example from above. Recall that a gum manufacturer has opened a new relationship with a retailer and the retailer has requested three flavors to put on its shelves. Your task, then, as a marketing manager is to figure out which three flavors to send to the retailer to maximize revenue.

Applied to this example, a traditional TURF analysis would identify the combination of three flavors that appeals to the widest number of gum consumers. This is a good starting point but it leaves out a critical facet of consumer decision-making: variety-seeking behavior. Sure, it's good to have a flavor for everyone but, to maximize revenue, you also need to have flavors that appeal to repeat and variety-seeking buyers.

Enter TURF-War (total unduplicated reach and frequency, while adding revenue). TURF-War starts out from the standpoint of our traditional TURF, identifying the product with the maximum consumer reach. Then, instead of looking only at the consumers not covered by our top product, it looks at all consumers and balances variety-seeking behavior with new coverage and arrives at a solution accordingly. Thus, if it were the case that most gum consumers cycle back and forth between buying original mint flavor and spearmint flavor, the manufacturer would be better off putting both flavors on the shelf instead of just one of these flavors. TURF-War moves us to this optimal solution; traditional TURF, on the other hand, would only offer one of these flavors and call it a day.

More than just one product

Whenever there is variety-seeking behavior – and we know that variety-seeking behavior exists in almost every consumer packaged goods category – there is benefit to appealing to people with more than just one product.

For a second example, take the case of media-buying. Yes, it is often the goal to reach the widest number of target customers with advertisements. But we know from basic psychological research on attitude change (specifically, research from a subfield of social cognition called evaluative conditioning) that reaching someone one time with an ad is unlikely to invoke any significant behavior change. Behavioral change happens through the repeated pairing of stimulus and response. From this perspective, it is potentially more valuable to reach fewer people but reach them more often (something that some companies, such as GEICO, have figured out). And this is what the TURF-War algorithm does. It starts out in the same way as a traditional TURF then empirically calculates the value of consumer duplication and chooses ad channels based on the combination of these two factors.

In short, TURF-War is designed to do a better job of modeling the underlying psychology of consumer choice. And, in doing so, it can lead us to the revenue-maximizing answer.

To show how TURF-War outperforms traditional TURF when it comes to the goal of maximizing revenue, let us return to our gum example. To keep things simple, imagine we recruit a small sample of gum consumers and ask them a purchase-intent question for each of our five gum flavors. And let's suppose our gum flavors are original mint, cinnamon, spearmint, citrus and grape. We also ask these gum buyers how frequently they purchase gum and whether they tend to buy the same gum over and over again or whether they tend to buy different flavors.

Here's what the results look like: 60 percent of our sampled gum consumers indicate they are likely to purchase original mint, 30 percent are likely to purchase cinnamon, 30 percent are likely to purchase spearmint, 10 percent are likely to purchase citrus and 10 percent are likely to purchase grape. Moreover, gum consumers indicate that they buy, on average, one pack per month and 50 percent of consumers indicate that they are likely to seek variety versus always choosing the same flavor when they purchase gum.

According to a traditional TURF analysis, we would select our most popular gum, the original mint, as the first product to include in the three-item lineup to send to the retailer. Next, we would look at the remaining products to see which offers the highest incremental consumer coverage. Let's imagine that, of the 30 percent of consumers who like cinnamon, none are covered by the original mint flavor. Of the 30 percent who like spearmint, all 30 percent are already covered by the original mint. Of the 10 percent who like citrus, all 10 percent are already covered by the original mint. And, of the 10 percent of consumers who like grape, none are covered by original mint. By the logic of TURF, we would next select cinnamon to include in our product lineup, because it adds the most incremental coverage (30 percent).

Finally, to figure out the third gum to include in our product lineup, we would look at the remaining products to see which offers the most incremental consumer coverage. Well, we know that all 30 percent of the people who like spearmint also like original mint, so spearmint doesn't offer any incremental coverage. Of the 10 percent of people who like citrus, all 10 percent were covered by original mint, so that doesn't offer any incremental coverage either. Finally, of the 10 percent of people who like grape, let's suppose that none of these people care for the original mint or cinnamon flavored gums. Thus, we would choose grape as the third flavor to include in our product lineup.

In effect, we would have something for everyone, or 100 percent coverage (60 percent of consumers are covered by original mint, 30 percent of the remaining consumers are covered by cinnamon and 10 percent of the remaining consumers are covered by grape; 60 percent + 30 percent

+ 10 percent = 100 percent coverage).

But here's the catch. Given that about half of gum consumers tend to seek variety when they purchase gum, might we be better off going with a gum that had wider appeal than, say, our grape, but for which the appeal was duplicated across other flavors? This is where TURF-War takes us. Balancing the value of additional consumer coverage AND consumer duplication, TURF-War favors a gum lineup of original mint, cinnamon and spearmint (not grape). Yes, this solution only gives us 90 percent unduplicated consumer coverage (not 100 percent coverage like traditional TURF) but it gives us more duplicated coverage (30 percent of our covered consumers like both original mint and spearmint), which can improve revenue in a variety-seeking category such as gum buying.

And, a bit of arithmetic can quickly show the value of TURF-War in maximizing revenue.

Let us first model the sales according to our traditional TURF solution. Again, to keep things simple, let's assume that gum costs $1 per pack and, as already stated, gum consumers buy, on average, one pack per month and about half of gum consumers are variety-seeking in their selections. Let's also assume the size of the market is 1 million consumers.

Recall that the traditional TURF solution (original mint, cinnamon and grape) gives us 100 percent unduplicated consumer coverage. Because we know approximately 50 percent of consumers are variety-seeking and that our traditional TURF gives us no duplicated coverage, our monthly sales projection would equal $500,000. In other words, we would capture half of the 1 million consumers' gum purchases (50 percent of purchases × 1 million monthly consumers × $1 per pack = $500,000).

That's pretty good coverage, but can we do better with the TURF-War solution? Well, recall that the TURF-War solution (original mint, cinnamon and spearmint) gives us 90 percent consumer coverage. However, within that coverage, it also gives us 30 percent duplicated coverage among consumers who like both original mint and spearmint. This duplicated coverage is valuable, as it gives variety-seeking consumers another flavor to choose from, resulting in less defection to competing brands.

Modeled out, TURF-War's 60 percent unduplicated coverage yields monthly sales of $300,000 (50 percent of purchases × 600,000 monthly consumers × $1 per pack = $300,000). Additionally, the 30 percent duplicated coverage yields monthly sales of $300,000 (100 percent of purchases × 300,000 monthly consumers × $1 per pack = $300,000). Notice the first term in the equation is now 100 percent instead of 50 percent because we are effectively offering the variety that consumers are seeking. And, adding together the two amounts we get $600,000 in monthly sales.

Thus, by sacrificing a bit of overall coverage for duplicated coverage, we make more money ($600,000 using TURF-War vs. $500,000 from traditional TURF). Although a $100,000 sales difference may not seem like all that much, scaling this up to yearly revenue (multiplying by 12) and taking into account an accurate market size (possibly 10 million monthly gum buyers), we are very quickly talking about a $12 million annual revenue difference.

This $12 million opportunity is realized by TURF-War but left on the table by a traditional TURF analysis. And, in today's hyper-competitive business environment, you can't afford to leave even pennies on the table.

An advancement

TURF-War is an advancement on traditional TURF analysis that takes into account the potential value of product, concept or channel duplication. It empirically calculates the value of duplication and includes this in its solution.

The beauty of TURF-War is that, in cases where consumer duplication is not valuable (for instance, in consumer categories where there is little variety-seeking behavior or repeat buying), TURF-War will yield the same solution as a traditional TURF. Only in cases where there is significant value in consumer duplication will the TURF-War solution differ from traditional TURF.

In other words, TURF-War can only do better than traditional TURF but can never do worse.

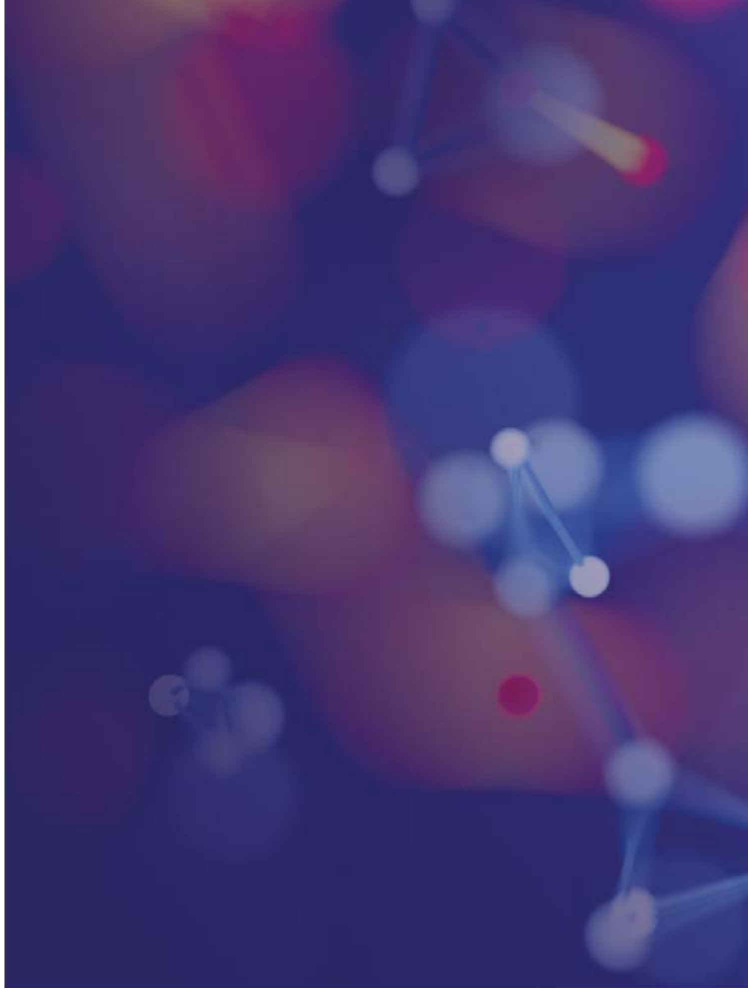
Mark Travers is an insights specialist at Burke, Inc., a Cincinnati research firm. Readers interested in more information on the technical details of TURF-War are invited to contact him at mark.travers@burke.com. The author wishes to thank Joelle Gwinner, Megan Nicollerat and Sharon Bosche for helpful comments on an earlier draft of this article.

research technology

Does tech connect the dots?

Highlights from the FocusVision 2016 Annual MR Technology Report

| By Sheila Wilson and Tim Macer



snapshot

This installment of the long-running study of tech in MR found storytelling on the rise and CATI on the wane.

The FocusVision 2016 Annual Market Research Technology Report is the latest issue of a study carried out since 2004 by our firm, London-based meaning. Every year this annual survey of technology across research companies uncovers a few surprises. Some of these, such as CATI losing its place as the industry's second mode of choice this year, confirm wider changes in the industry. Some – like the spread of storytelling, the use of visuals in online surveys and evidence that MR is facing up to big data and embracing it – show encouraging and reassuring developments. Others, like difficulties with the dissemination of knowledge through the industry about technological developments, or the limited progress higher-tech data-reporting methods are making, should give us pause. For this article we have picked out some of the more striking results from the newly-released 2016 report.

The report is based on a sample of around 220 companies around the world, conducted as a 15-minute online interview offered in five different languages during late December 2016 and early January 2017. The 2016 study is available to download at http://bit.ly/2pknci8 (registration required). Previous reports are available from meaning.uk.com.

Little real change

Since 2006, we've tracked the proportion of projects using the main results-delivery methods. To be frank, there has been little real change over time. Tables on paper and Acrobat PDF are falling out of favor but PowerPoint is surging ahead (Figure 1). There is no sign of a mass move towards high-tech delivery methods such as online dashboards or interactive analysis.

MR companies still seem reluctant to take the plunge with these advanced technologies, which we suspect relates to problems in monetizing them. We believe the industry is missing a trick. These tools

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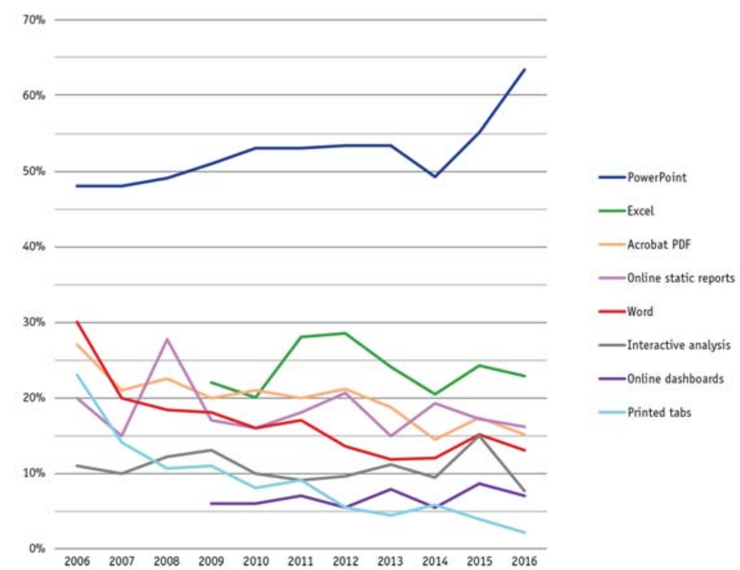


Figure 1: "What percentage of projects currently involves the following deliverables or distribution methods to the client?"

can bring down operational costs by removing error-prone semi-manual processes and by allowing clients to run all those persnickety extra tables for themselves.

Nearly every year, 2016 being no exception, we see larger companies more likely to deploy the higher-tech results-delivery methods, particularly dashboards. They have greater resources and probably also the volumes to achieve better economies of scale. To deliver dashboards and infographics, you need a pipeline of creative, technical and analytical skills, which is easier for the larger firms.

Also since 2006 we've asked companies what proportion of their survey work is fulfilled through each different interviewing mode. Here, the picture has changed dramatically. In response to the opportunities – and client-imposed pressures – to work faster, cheaper and better, interviewing continues to gravitate from CATI towards the Web.

Below this headline shift, the picture is more complex. In the earlier days of Web, some of its growth was also fueled by self-completion mail studies on paper switching to the Internet. We suspect most of these paper-based studies converted to Web interviews long ago: it's now the other side of paper that is making the transition. In 2016, for the first time, CAPI overtook CATI to become the industry's second interview mode (Figure 2). Paper may seem inexpensive but the administrative burden is high. Today, the availability of low-cost tablets and smartphones, and the ubiquity of Wi-Fi and cellular data networks, means there is a lot less resistance to overcome in moving face-to-face interviews from paper to CAPI.

Storytelling is well-embedded

In a new question this year, we asked companies how many of their projects now use storytelling. The mean average share of projects across all companies appears in Figure 3. It shows that storytelling is well-embedded as a method across the industry. In contrast to the effort of introducing new technologies such as dashboards or interactive analysis portals – which are not enjoying such popularity – storytelling is a low-tech, low-cost way to bring the results to life. We suspect this has influenced its success.

Larger companies are more likely to use storytelling than smaller ones. There is also an observable difference across the regions of the world, with North America reporting

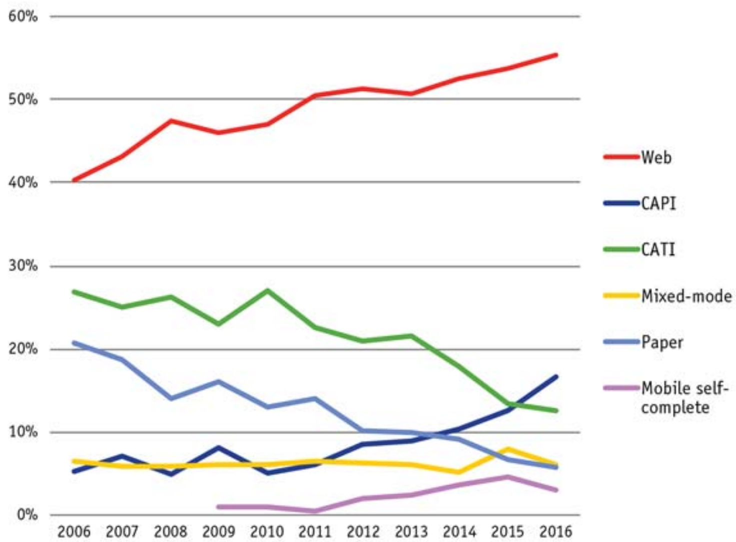


Figure 2: "Focusing on your quantitative research activities, please indicate the approximate proportion of your work represented by each of these interviewing modes or combinations."

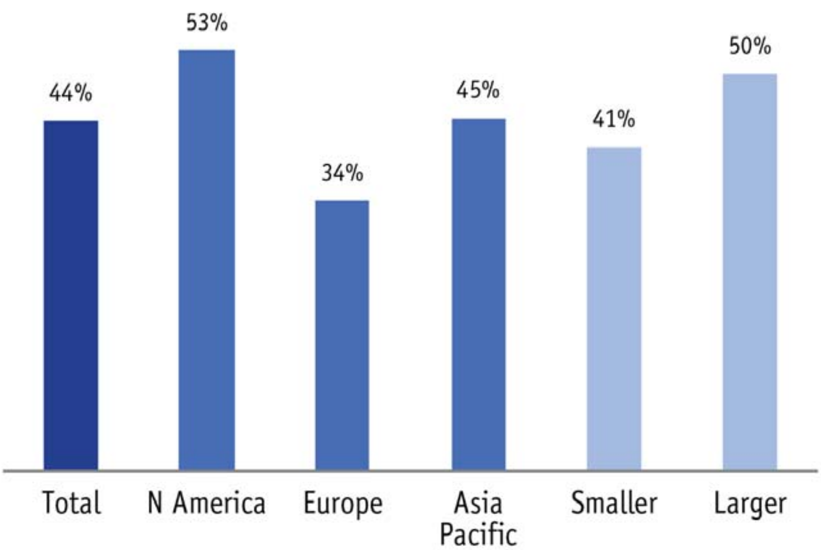


Figure 3: "Approximately what proportion of your company's projects now use storytelling as a way to make the data presented more accessible to their primary audience?" N=169.

its use on more than half of projects, while it is only a third of projects in Europe that currently get a narrative treatment. It is a global difference we are at a loss to explain.

Visualization of data has received a lot of attention in the industry but we also wanted to look at how firms are visualizing other areas of research.

In one question (not shown here) it turns out 90 percent of companies say it's important to make online surveys more visual in appearance. We asked them what kind of visual components they use in surveys (Figure 4). We are heartened to see that many have tried interactive graphics and a few have also used augmented reality, which is truly innovative.

However, more than a quarter (28 percent) don't normally use any visual elements in surveys. We suspect this is influenced by cost and time, as it takes effort and special skills to make surveys look beautiful across all the devices they are likely to appear on today.

Not innovative

In 2015, this annual survey discovered many research companies did not consider themselves, nor the research sector in general, to be technologically innovative. It also found research companies to be relying heavily on their technology providers as a source of innovation. This year we wanted to better understand some of the barriers and what technology providers need to do to help research companies know more about new innovations, as they become available.

We find research companies are not very confident in keeping up to date with technological development

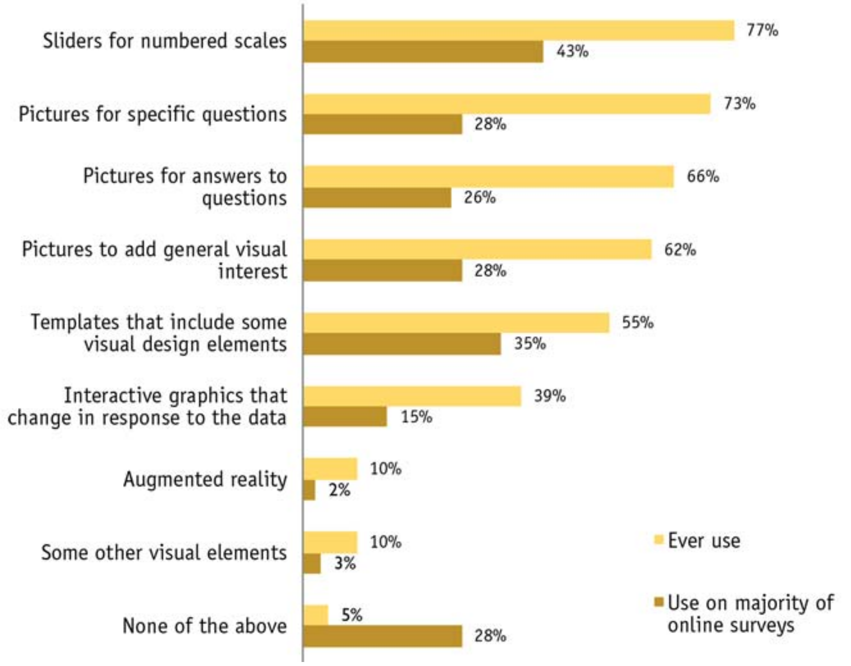


Figure 4: "A) Which of these visual components does your company ever use in its online surveys? B) Which of these visual components does your company now use in the majority of its online surveys (that is, on more than half of them)?" N=198 (A) 212 (B)

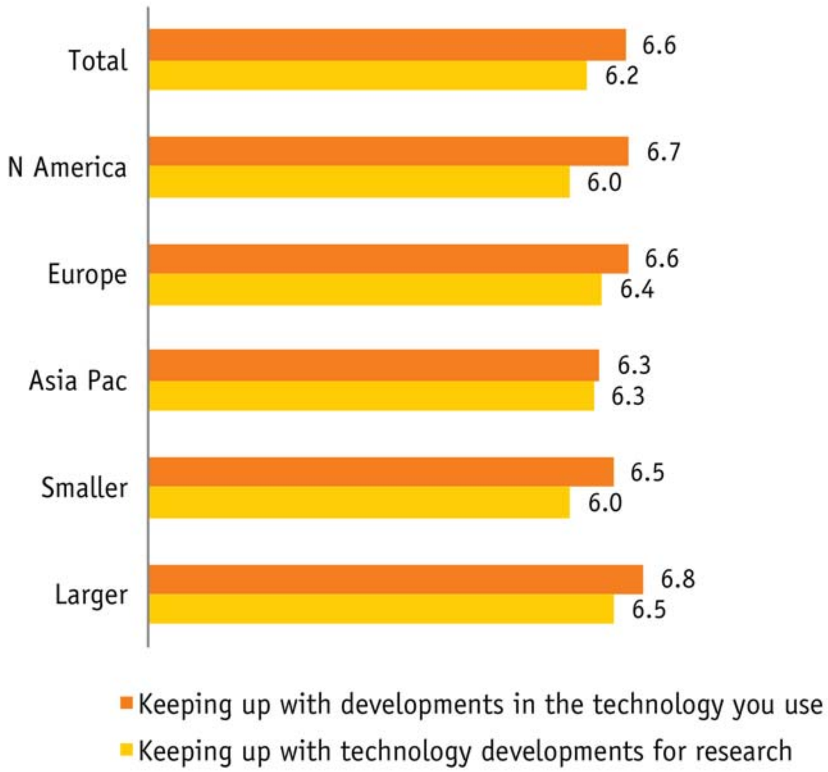


Figure 5: "How confident do you feel that you are keeping up to date with developments in (a) the technology for research and (b) development and enhancements to the actual technology that you use on a regular basis?" Scale of 1 to 10, where 10=totally confident. N=221.

in the software they use and even less so with industry advances, as is apparent from the low scores in Figure 5. While North American firms are the least confident in staying abreast of industry-wide developments, they are slightly more confident than others on knowing how the technology they are using is developing.

In a different question, we asked about participants' favorite ways to find out about technology innovations. Webinars from technology providers were slightly ahead of

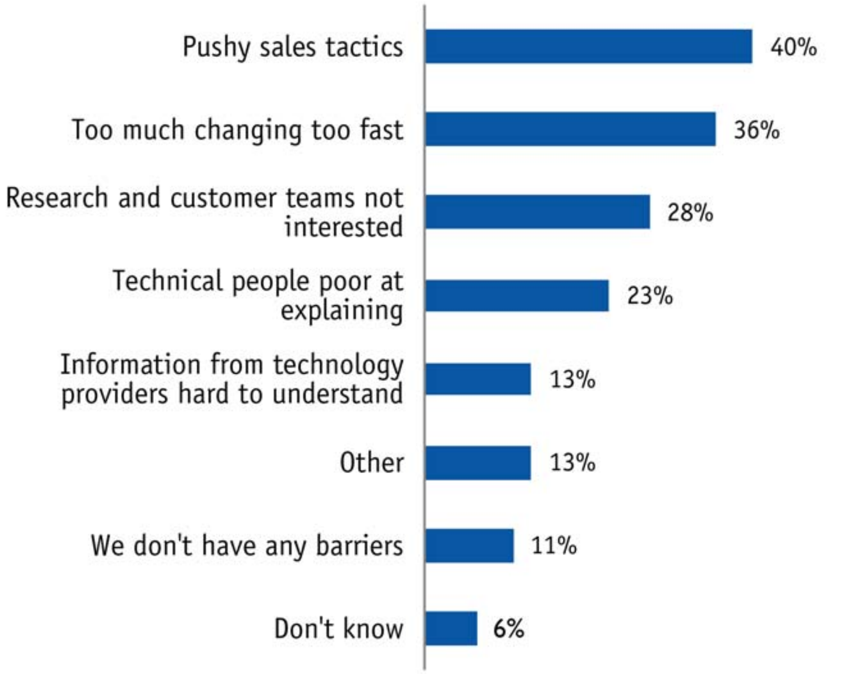


Figure 6: "Which of these barriers to learning more about technology do you experience within your organization?"

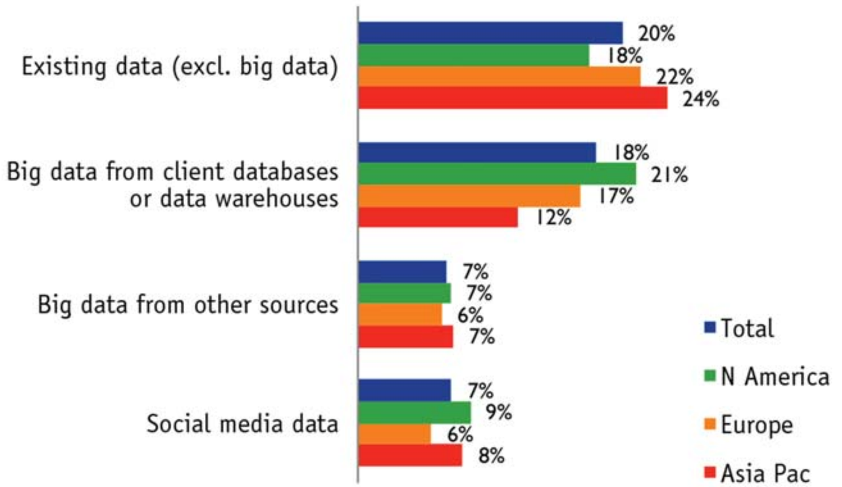


Figure 7: "Focusing on the existing data you work with, what proportion of the projects your company has worked on in the last year include..."

conferences and trade shows. This is especially true in North America, though in Europe, industry events topped Webinars, while in Asia-Pacific, firms are more receptive to hearing it directly from their providers. In further questions on this topic, we found the tech-savvy participants to this study aim to spend about six hours a month specifically on keeping up to date with technology developments. Unfortunately, some 42 percent admit they don't usually hit this target.

Concerns about the rate at which technology continues changing come high among the barriers research companies identify in learning more about what technology can offer. None of us can control the rate of change but anxieties will be magnified if you don't manage to put in all the time you intended to find out what's happening, as many firms admitted. Despite this, what tops the list is something that technology providers can address – and they need to. Research firms singled out pushy sales tactics as the No. 1 obstacle (Figure 6). In verbatim comments, companies said they wanted to see more evidence to back claims, more real-life case studies and less "snake oil."

While we know that many technology providers will bristle at the suggestion that they place the pursuit of the sale above the needs of customer, research companies are saying this is happening too often, and when it does, it gets in the way of them learning, innovating and, ultimately, investing in the technology. Providers need to trust their products more and make what they do – and how they do it – more apparent.

Embracing big data

Big data continues to be big news in the research industry, though stories are increasingly about the pains of adoption. We wanted to gauge just how much the research industry is embracing big data and other unconventional forms of data – and what future these might hold, in the light of practical experience.

The 2016 survey tells us that while surveys make up 77 percent of the data that research companies work with, 9 percent now comes from observational data and a further 9 percent from existing data such as big data or social media data. We also find 43 percent of firms are now working with social media data, up from 17 percent from when we asked about this in 2010, when social media analysis was in its infancy.

Specifically, as shown in Figure 7, many projects now include some big data and around 7 percent refer to social media data – proportions that appear to be growing.

Handling big data is also viewed as a future core competency for research companies. In another question, we asked research companies how important they consider it is for them to offer big data analysis and interpretation. Forty-one percent of them think it is of high or the highest importance and this rises to a majority (57 percent) when looking five to 10 years ahead.

Companies also show clarity over

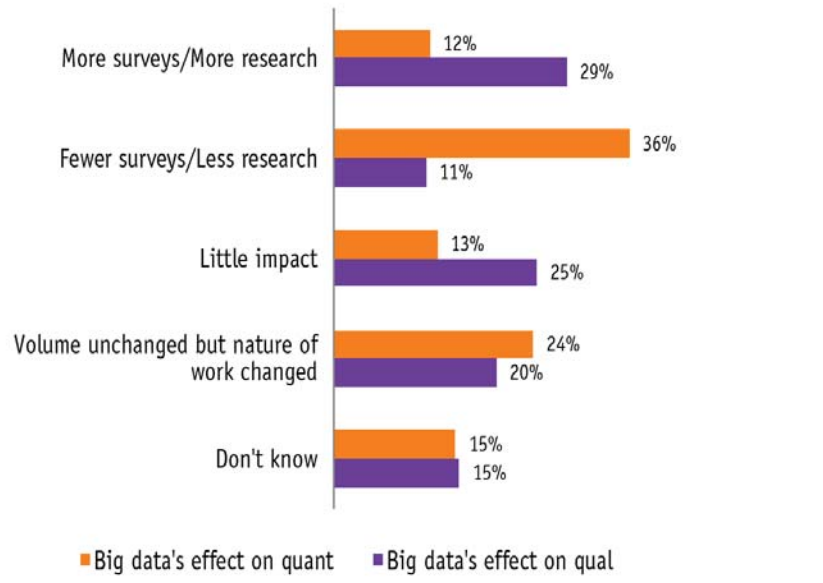


Figure 8: "What effect will big data have on quantitative research over the next five to 10 years? What effect will big data have on qualitative research over the same period?"

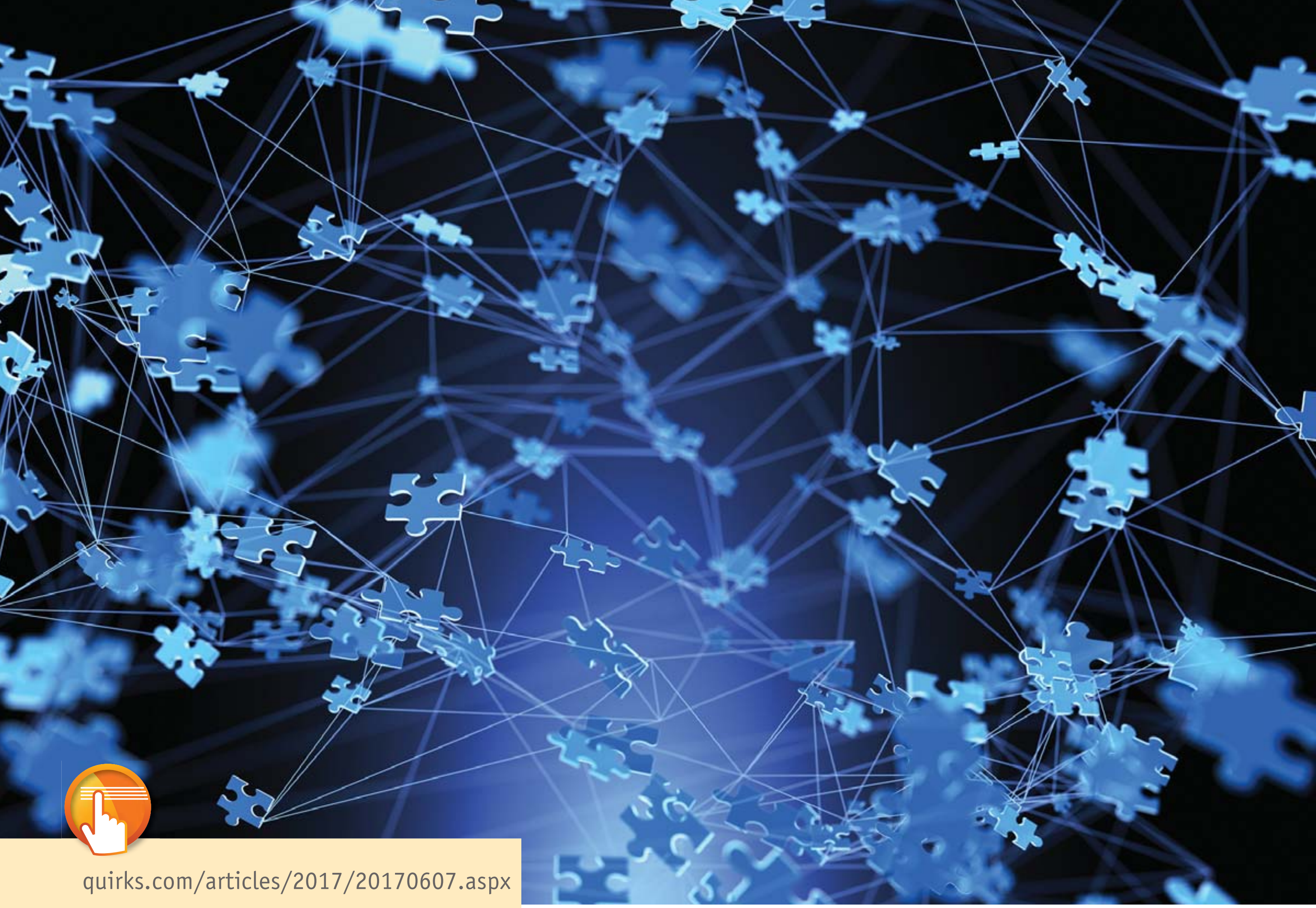
differences in the impact that big data will have on qualitative and quantitative research (Figure 8).

Qual is expected to be a long-term beneficiary of the growth in big data, while a different fate seems to await quant, with few seeing more quant work as an outcome. However, just short of half of firms think the impact will be negligible in volumes, though some of these believe the nature of qual work will change and rather more think it will change the nature of quant work. While views may differ over how this will play out, very few participants think the net effect will be less research in the long run.

Context and meaning

Whether realistic or not, viewed alongside the many other incremental changes this report identifies, it appears technology is allowing MR to see where it can bring context and meaning to a world where data is plentiful and cheap, time is short and budgets are perennially squeezed. Though our respondents indicated they could spend more time keeping pace with technology's changes, they at least seem to be able to use it effectively to improve processes for themselves and their clients.

Tim Macer is managing director and Sheila Wilson is research associate at meaning limited, a U.K.-based consulting firm. They can be reached at tim@meaning.uk.com.



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••• advertising research

A memorable impression

How to create brand memories in advertising

| By Charles Young

snapshot

Charles Young looks at how marketers can sell to the three brains of the consumer: conceptual, social and physical.

The Nobel Prize-winning economist Daniel Kahneman has had a wide influence among marketers with his popular book, *Thinking, Fast and Slow*. Many have embraced his ideas about the different roles that System 1 and System 2 cognitive processing play in describing how audiences engage with advertising. What is generally overlooked in Kahneman's book, however, is the third element: the central role that memory plays in the consumer decision-making process.

Clearly, memory plays a major role in any reasonable model that describes how brands work in the brain. In the *Mad Men* days of early television, researchers measured the quality of a TV commercial using a day-after recall score. Intuitively, the researchers felt that to affect future consumer behavior, advertising must leave behind some trace in consumer memory. Yet today, for most marketers, recall testing has taken a backseat to measuring emotional engagement through new


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scientific technologies such as facial response coding or brain wave analysis. And memory itself remains one of the least-understood variables in the psychology of marketing.

Memory, as we now know from neuroscience, is a lot more complicated than we thought. The one-dimensional model of memory (as represented by the traditional recall test of advertising effectiveness) is an oversimplification of complex, multidimensional processes that occur in the brain when a consumer interacts with the many touchpoints of a brand. Our research suggests that strong brands build memories in at least three dimensions of the mind.

Endel Tulving, the senior editor of the *Oxford Handbook of Memory* and "the father of modern memory research," was one of the first researchers to describe the brain's three primary memory modules: the semantic, episodic and procedural memory systems.

This three-dimensional model of memory represents a significant shift in viewpoint from the traditional dichotomy of rational versus emotional that is frequently used to frame the discussion about how advertising works to build a brand.

What are the key differences between the three memory systems?

The conceptual brain. According to Tulving, the semantic memory system is outer-directed and builds mental representations of how the world works – its frame of reference is the universe.

The semantic system processes ideas and uses language and logic for its operations. We associate this part of the brain with abstract thought and metaphor-generation, which helps the brain create categories for organizing our experience of the world "out there."

Activities strongly rooted in semantic memory include accounting, law, mathematics, education, science and the form-filling, rule-making bureaucracy of government.

For marketers, mental constructs linked to the semantic memory system involve concept testing, the idea of unique selling propositions, brand positionings and advertising strategies (as opposed to execution) that focus on features and benefits and reasons-to-believe proof-points.

Researchers should note that the semantic memory system can be readily accessed through verbal self-reporting – which is what forms the basis of most traditional research methods. It is also the memory system most easily accessed by traditional advertising recall testing.

The social brain. In contrast to semantic memory, the episodic memory system is inner-directed and its frame of reference is experience from the point of view of the self. Episodic memories are organized according to time, not categories. These literal "episodes" build our internal timeline and generate a continuous narrative of consciousness to create our sense of self.

Losing these personalized, autobiographical memories – through Alzheimer's disease, for example – is particularly painful, as it represents a sad loss of self.

Episodic memory functions through the principle of association – objects, ideas and experiences that frequently occur together connect in memory, even though there may be no logical or causal relationship between the two. And these memories, tagged with emotions such as joy, surprise, sadness, fear, anger and disgust, form the raw material of storytelling.

Storytelling – particularly in its most basic form, gossip – is the communication content that underpins most of our social relationships. Indeed, according to Yuval Harari, the author of the best-seller *Sapiens*, the evolution of our social memory system may have fundamentally transformed our development as a species. Our social memory system which, like Facebook or LinkedIn keeps track of our social relationships, lets us cooperate in social groups and is probably the most important reason humans occupy the top rung of the food chain.

To emphasize its primary role in social communication, we frequently refer to the operations of the episodic memory system as the "social" brain.

Items rooted in our social or storytelling brain include: politics, literature, movies, television, news, social media, even the greeting card industry and product reviews on Amazon.

Marketers understand the power of effective storytelling, whether of comedy or drama. They understand that appeals to the conceptual, thinking brain are fundamentally different from appeals to the social, feeling brain. And they intuitively understand that storytelling is usually more powerful than logic.

Since stories can be told in both words and pictures, e.g., in books or movies, episodic memories can be both created and retrieved both verbally and visually.

Given the tremendous growth rate of personal videos and photographs (including a great many selfies) being shared on social media channels such as Facebook, Instagram, Pinterest, Snapchat, etc., it appears that the socialization of visual memories is transforming the ways ordinary people communicate.

The physical brain. The third and most primitive (and therefore probably the most powerful) memory system deals with our physical self, not our mental self. Known in the academic world as the procedural memory system, it deals with the basic operational memories of how to perform specific actions, such as riding a bicycle, driving a car or using a spoon.

More generally, this memory system links directly to our physical senses such as the five traditional senses of sight, sound, taste, touch and smell, which is why we prefer to call it physical memory.

It would be a mistake to think that the physical memory system is only linked to a consumer's physical interactions with the brand. Research into the role of physical memory on a brand's touchpoints is not just the realm of product research or taste tests.

Mirror neurons, which were discovered by neuroscientists in the 1990s, are a powerful aspect of the physical memory system. These neurons fire in the brain not just when we perform an activity ourselves but also when we watch someone else perform an activity. Mirror neurons form the neurological basis of human mimicry – a fundamental way we learn to do things.

Mirror neurons also allow us to adopt another person's point of view. When we watch a baseball player hit a ball, we ourselves record the hit of the bat in our own physical memory system. When we watch someone eat an ice cream cone, the mirror neurons in our brain trigger our memories of what ice cream tastes like – which in turn may trigger the desire to buy our own ice cream cone.

Decoding how advertising really works

For marketers, understanding the interaction between the brain's memory and the mirror systems may become central to decoding how advertising really works in the brain. When we watch someone in a television commercial enjoy a bowl of cereal, wash their hair, drive a car or touch an iPhone screen, it engages our mirror systems and we mentally rehearse doing the same thing – it's called virtual consumption.

Interestingly, when remembering, the human brain does not distinguish between real brand experiences and virtual experiences. Because of this, virtual consumption memory (a memory created by watching an experience) may become a false memory. Understanding how this Matrix-like

Figure 1: Three types of brand memories

Think (Targeted to Head) | Feel (Targeted to Heart) | Do (Targeted to Body)

phenomenon works is an active area of research study and is likely to become even more important with the influx of mass-market virtual reality and augmented reality technologies.

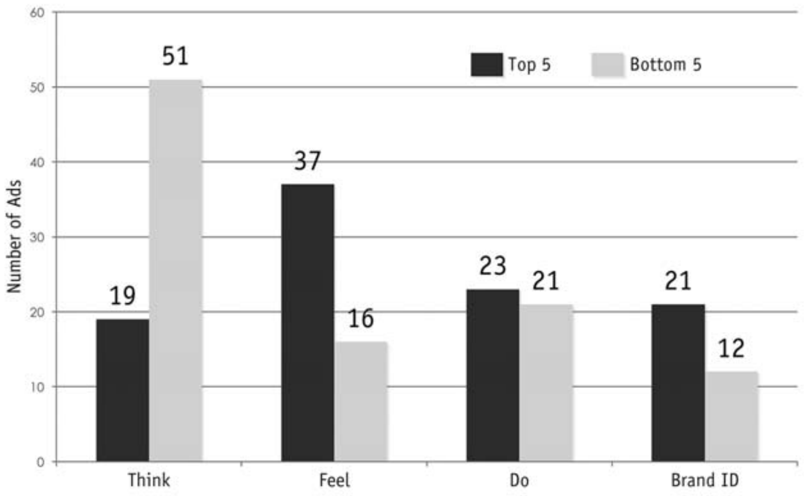
Activities strongly rooted in the procedural or physical memory system might include cooking food, listening to music, watching sports, playing video games and even looking at pornography (its relationship to virtual consumption is why food marketers call deliciously beautiful pictures of food "food porn").

Physical sensations are distinct from social emotions, though the two are deeply connected in the brain. For example, psychological experiments have shown that the act of holding a hot cup of coffee in your hands can cause you to form the perception that a person you just met has a "warm" personality.

Although they are deeply connected, the common language we use to describe social emotions and physical sensations can cause confusion about the different roles that emotions and sensations play in the brand-building process.

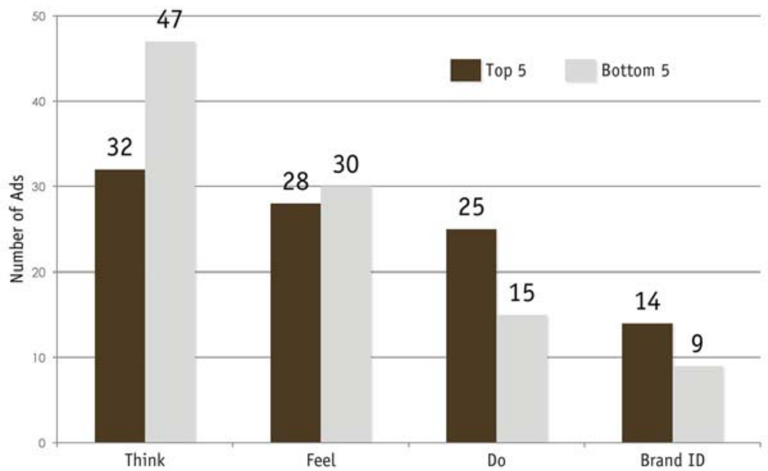
As the Pixar movie *Inside Out* illustrated, the word "disgust" can refer

Figure 2: Image types - top 5 and bottom 5 most-effective QSR advertisers - year 1



Ads that were most motivating spent more time making audiences feel, not think, and linked these feelings to the brand.

Figure 3: Image types - top 5 and bottom 5 most-effective QSR advertisers - year 2



Ads that were most motivating spent more time generating physical, not thinking, memories and linked these to the brand.

to our physical reaction to toxic food or our emotional reaction to a socially toxic person. The word "fear" can describe our reaction to something dangerous in our physical environment or to a person dangerous to our social well-being.

The lack of a well-defined vocabulary for discriminating between specific emotions and specific sensations may be one reason why marketers do not often distinguish between an emotional reaction and a sensory reaction to the different perceptual cues they put in their advertising imagery. But the two are actually quite different in terms of the kinds of memories they create.

All three types of memories are important

In the end, all three types of memories are important for constructing a brand in the mind of the consumer. Some may be more important than others, depending on what's being advertised. To manage the growth of a brand, should a marketer strive to keep the three types of memories in some kind of balance, at least when looking across their entire portfolio of advertising and other brand touchpoints? Or, to solve a particular marketing problem, should some types of memories receive more emphasis than others? Do the most effective ads create all three types of memories or can an ad be more effective by focusing on only one or two types of memory? These questions are still open for research to answer.

To provide an empirical foundation for that discussion, let's look at the data on the three kinds of memories generated by a large number of fast-food TV commercials. In a recent meta-analysis, we looked broadly at the most memorable content of all the advertising we tested in the fast-food category over two consecutive years. These years gave us a sample of 590 TV commercials, tested among 59,000 consumers, for the top 16 brands in the quick-service restaurant category, including McDonalds, Wendy's, Pizza Hut, KFC, etc.

In our testing, we use a moment-by-moment short-term memory test, our Picture Sorts, to predict the long-term memories created by TV advertising. With this diagnostic approach we have learned that the average 30-second commercial creates four peak memories, which are largely responsible for building long-term brand equity through the advertising.

In our study, we use the coding scheme below to categorize each ad's peak visual memories into areas representing the three memory types:

Concept images: Semantic content contains images that trigger thinking. It is largely identified by information conveyed in words or numbers on-screen. In the QSR category, semantic content might include a special price offer, the word "new" for a new product introduction, a deal for a meal combo or the announcement of a holiday sale or other promotional event.

Social images: Images that generate episodic memories are largely focused on human interactions and relationships, between live characters or trade characters (such as the Burger King "King") or may even include the body language and non-verbal expressions of a presenter talking to the audience. Social images help answer the question, "How do I feel about these characters and their situation?"

Physical images: The images in this category 1) evoke a sensory reaction, e.g., the tactile reaction to a cheese pull or heat-response to a burger sizzling or 2) cue a relevant rehearsal behavior, e.g., the physical act of a bite-and-smile or a phone call for pizza delivery that the advertiser wants the consumer to mimic.

As illustrated in Figure 1, you might think of the three memory types in terms of images targeted to the head (thinking), the heart (social feelings) and the hand (physical sensations).

In addition to the three memory types, we also coded for a brand identifier: Was the name, logo or even a picture of the store itself in the commercial memory peak?

Having an image identifying the advertised brand in a memory peak is key to brand linkage for the ad as a whole and therefore is important for memory retrieval at the point of a future purchase decision.

Looked at the different memory types

In our analysis, we looked at the different memory types created by the most-effective versus the least-effective advertisers for that year. We grouped the top five brands and bottom five brands as measured by the average Motivation Score across all of a brand's ads for the year.

When we did so, an interesting story emerged, with a curious variation between the two years (see Figures 2 and 3).

In test year one, the most-motivating brands created fewer thinking-type memories than the least-motivating brands, by a wide margin – 19 percent versus 51 percent. Instead, the most-motivating ads created more feeling-type, social memories, 37 percent versus 16 percent. The most-motivating ads also had more peak memories focused on the brand identifier, 21 percent versus 12 percent, generating better brand linkage overall for the memories being created. In other words, getting consumers to feel, rather than think, was the key to success – especially if those feelings were linked in memory to the correct brand.

In test year two, the story differed slightly. The study again showed the most-motivating ads contained far fewer thinking memories than the least-motivating, 32 percent versus 47 percent. In this year, though, the most-motivating advertising generated more doing-type physical memories, 25 percent versus 15 percent. And again the most-motivating ads had more peak memories focused on the brand identifier, 14 percent versus 9 percent. In other words, appealing to a consumer's physical sensations, rather than their reason, was the key to success in that year.

Emotional is more powerful

The data indicates that the ad agency creatives are correct in claiming that emotional advertising is more powerful than rational advertising – if, by "emotional" we mean either socially-connected memories or memories of physical sensations.

However, it is not certain that this is true in all cases. For example, in a non-food category with introductory advertising designed to launch a new product, it is likely that getting consumers to stop and think about a new product, its reason-for-being and a demonstration of its advantages versus competing products will play a more important role.

The insight from this analysis challenges marketers to think more deeply about advertising on a "not-rational" level: In terms of imagery, focusing your advertising on creating social memories is a very different creative strategy than creating sensory memories.

Understanding how to create all three types of memories for a brand and how to balance them in your category to solve a given creative problem can empower you to design more effective strategies to grow a three-dimensional brand, one that is fully present in consumer memory.

Charles Young is founder and CEO of Ameritest, an Albuquerque, N.M., research firm. He can be reached at chuck@ameritest.net.

••• sensory research

Studying the subconscious

Applying biometrics to consumer product research

| By Daniel Blatt and Michelle Niedziela

snapshot

A fragrance example is used to show how biometrics can be a helpful addition to sensory research.

The introduction of applied consumer neuroscience in consumer product research is a relatively new yet rapidly growing field. The need for understanding the emotional responses in sensory and consumer studies has become more and more frequent and necessary in the last 10 years.

When a consumer approaches a product on shelf, she may pop open the top to sniff it. Does she like it? Probably; it was a well-designed fragrance. But is that enough to drive purchase? And when consumers experience a product, they do so five-dimensionally via the five sensory systems: taste, touch, sound, sight and smell. Each of these senses becomes an opportunity for communication of a product's concept, branding and even higher-order benefits (such as stress relief, moisturization, etc.). These sensory communications become part of the overall product and brand messaging as well. The product experience is more than just a hedonic experience; there is also an emotional and functional experience which must be considered.

It is important to assure there is alignment of product sensory attributes with brand and product concepts to ensure a positive and cohesive product experience. For example, the emotional qualities of the fragrance should be aligned with the emotional communications of the package, the brand and the advertising. In addition to understanding how much consumers like a product, we also need to assess attributes such as feeling comforted, energized, refreshed, happy, etc., to understand if the product will meet all the needs of the consumer beyond liking. When these pieces are not cohesive, it can contribute to consumer dissatisfaction and negatively impact consumer liking.

What is well-liked and why

Product research traditionally assesses explicit – conscious and deliberate – reactions to stimuli, providing useful information for product development about what is well-liked and

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why. While extremely valuable, some research disciplines have advanced beyond explicit methods to try and understand consumer subconscious reactions, those that the consumer may not even fully appreciate yet influence many of their behaviors. For example, the field of advertising research has been an early adopter of applied consumer neuroscience, which measures the physiological response to stimuli, to understand these System 1, subconscious reactions.

In a study using traditional explicit methodology for consumer product research, participants provide their opinion of the smell or taste using a rating scale or a check-all-that-apply attribute list. The consumer responds to how they feel about the product, as a considered answer with time allowed to construct and rationalize their opinions. Yet we know that emotions occur quicker than our cognitive system, so valuable data is likely not captured. Using applied consumer neuroscience, we can measure how the brain reacts in the fractions of a second after fragrance exposure, possibly giving new insights into the consumer's emotions and future purchase behavior.

Could product testing adapt applied consumer neuroscience and get a deeper understanding of emotions and help guide product and concept development? Would the non-cognitive responses provide valuable additional insights for development of product concepts and features and help provide predictions about buying behavior?

Q Research Solutions (Q) wanted to examine the value of incorporating neuroscientific measurements in consumer product research and so conducted a study employing neuro-physiological measurement to see if and how the neuro-physiological testing would result in enhanced emotional profiles, better understanding of consumer preferences and subsequently provide better guidance for product development. The questions which the study explored were: 1) If we can measure the System 1 responses of subconscious reactions, could there be valuable additional insights? 2) How could going beyond measuring pleasure, or hedonics, to understand experiences – which are not verbalized by consumers – help guide product development?

Q decided to conduct the study with four different tropical-scented plug-in air fresheners, chosen because it is a lead olfactive direction within a well-developed category. The consumers were female, aged 18-60, who had purchased tropical- or exotic fruits-scented plug-in oil air fresheners in the past six months.

The panelists were tested for both cognitive and subconscious responses to the four different products – identified here as Product A, Product B, Product C and Product D. The consumers tried the four products in a sequential monadic two-stage study following ASTM protocol over two days. The fragrances were presented in eight identical airflow-controlled booths, which have positive airflow to eliminate cross-contamination.

In the first stage, consumers entered a pre-fragranced booth and provided ratings on liking, fragrance intensity and other explicit measures. For this traditional explicit stage, 10 attributes – happy, contented, comforted, refreshed, sexy, energized, irritated, relaxed, sad and bored – were assessed via a check-all-that-apply list. These were selected to cover positive and negative valence as well as high and low arousal. Check-all-that-apply data was analyzed using a simple frequency table so that we could see the percent of consumers who selected each attribute per fragrance. The higher the percent of consumers who selected an attribute, the better that attribute described the fragrance. Hedonic and intensity measures were analyzed using an analysis of variance with a Fisher LSD post hoc test.

In the second stage neuro-physiological procedures involved measuring physiological responses from electrodes placed on the consumer's face (facial EMG), hand (galvanic skin response) and wrist (heart rate variability). They entered the fragranced booth while wearing nose clips in order to avoid fragrance exposure until prompted; once seated, they were instructed to remove the nose clip to start the test. Consumers were asked to sit and breathe normally for 15 seconds while physiological responses to the fragrance exposure were captured. They then moved on to the next fragrance booth and repeated these steps.

Guidance from other measures

The fragrances examined all scored well hedonically. In fact, there was a parity for "liking" all the fragrances. This is a very common result in flavor and fragrance testing. The consumers rated most of the products as making them feel happy and refreshed. It was clear, therefore, that product development guidance would need to come from measures other than the explicit. By layering on a neuro-physiological approach, we uncovered additional understanding of emotional valence. Three of the four fragrance profiles included negative valence with attributes such as irritation and annoyance.

Physiological results also revealed how the emotional reactions changed over the time course of fragrance exposure. Being able to measure how the fragrance changed consumer perception over time based off of physiological measures has allowed us to better understand the consumer experience.

In the case of one fragrance, we were able to measure how the response which was initially neutral became more approachable or welcoming towards the end of the experience.

For Product A, the experience, as revealed by the neuroscientific approach, was fairly neutral, even boring. There was a positive valence at the beginning which began to significantly decrease over the period of exposure. The testing of Product A also showed a moment of significantly decreased negative valence.

With Product B, there was a decrease in positive valence immediately, followed by a decrease in negative valence. In other words, this fragrance was arousing, but not immediately. The responses indicated some disengagement with the fragrance with a combination of increased arousal and decreased attention.

Product C was found to be arousing up front and for most of the experience. This was negative as well as positive, however, resulting in a tension between the two responses. At the same time the consumers found this fragrance to be less approachable, suggesting some distraction or disengagement.

Product D had an overall negative valence reaction and the arousal was sustained for half of the experience. The fragrance was initially aversive, becoming more approachable and welcoming over the period of exposure, signaling that this product would perform well over longer exposures in an in-use environment.

Valuable data points

From our work we have seen how applied consumer neuroscience can be a potentially important tool in product and consumer research, providing valuable data points for decision-making. While first impressions are very important to the consumer, understanding how perception and experience change over time allows us to differentiate similar test samples in ways that traditional research cannot. These nuances can reveal large differences between samples, differences in experience that consumers may not even be aware of or able to articulate but that influence their overall perception of the product.

The best methodology for each study needs to be considered and it is definitely not a case of having this be part of every study. At the same time, there is tremendous scope for further refining the application of biometric testing in this area. This novel holistic approach to consumer science will provide product developers and consumer scientists with a sensitive and efficient way to better understand consumer behavior and emotion, differentiate changes to product attributes and make more informed product design decisions.

Daniel Blatt is SVP, research services, at Q Research Solutions, Old Bridge, N.J. He can be reached at dannyb@qrsglobal.com. Michelle Niedziela is scientific director at HCD Research, Flemington, N.J. She can be reached at michelle.niedziela@hcdi.net.

advertising research

Signs of confusion

Using semiotics to understand consumer responses to advertising

|By Laura Oswald

snapshot

The author uses a case study of a poor-performing coffee ad to explore the value of semiotic analysis as an ad research tool.

We all know cases of ad campaigns that win awards for artistic achievement but fail to gain traction in the marketplace. In my experience, the problem usually originates in conflicts between the campaign's messaging and the brand's core positioning and identity. Such conflicts generate consumer confusion and distrust because they communicate ambiguity about the brand's core value proposition and legacy.

After all, the strategic function of any single ad is based not upon a single image but upon relationships between the brand's historical legacy, the competitive environment and consumer culture. The single campaign does not stand alone.

I increasingly field requests from marketers to perform a one-hour semiotic assessment of an ad campaign or new product concept without any prior participation in their project. The strategic semiotic analysis involves comparing and contrasting the ad's semiotic structure with a large set of ads for the category (Oswald 2012).

In a manner similar to military strategy, semioticians – those who study and understand the use and meanings of signs and symbols – assess the strategic value of any single marketing event with reference to its relationship to other players and variables in a market. The strategic function of a campaign, concept or design strategy relies entirely on the way it aligns with four intersecting contexts: the brand's historical legacy; the competitive environment; category trends – including technology; and consumer culture. Though the textual analysis of specific ads defines an early stage in the semiotic process, strategic semiotic research does not end there.

Respondents could not agree

A case in point is an advertising study I conducted for a global coffee brand that I will reference with the pseudonym Instant Gourmet. In advertising testing, respondents could not agree on the ad's cultural positioning (Figure 1). Was it pop art, fine art or

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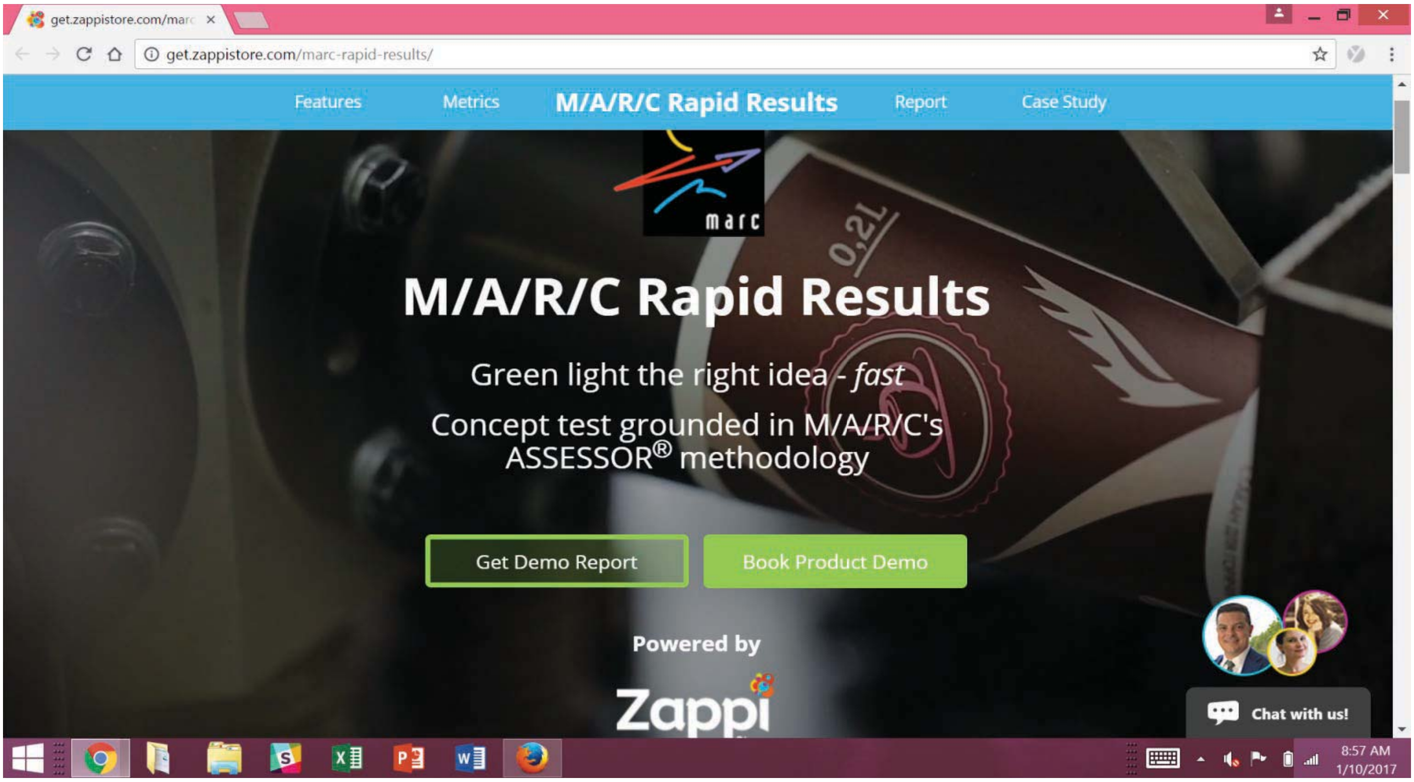

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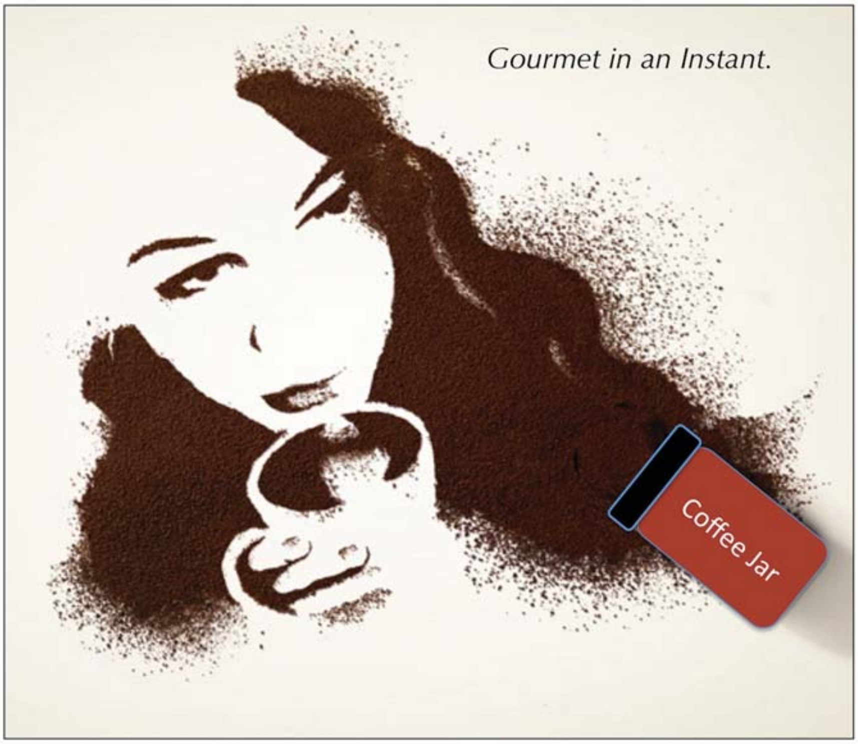

Figure 1: The Instant Gourmet ad.

Table 1: The Gourmet and Luxury Cultural Categories

	Gourmet Culture	Luxury Culture
Sector	Gastronomy, wine, spirits	Fashion, design
Experience	Work, achievement	Leisure, esthetics
Value Proposition	Connoisseurship, expertise, awards	Creativity, originality, celebrity
Quality Perception	Authenticity, integrity	The appearance of "taste," status, showy display
Mood State	Intellectual, serious, hard	Sensual, pleasurable, soft
Gender	Masculine	Feminine
Esthetics	Dark, understated; hard edges; symmetry	Whites, pastels and shiny; soft edges, flow

avant-garde? Respondent perceptions were reiterated by findings from the semiotic study of the campaign that follows. (For a detailed case summary, see Oswald 2015 chapter 2.)

The ad agency was banking on the campaign's innovative esthetics to earn strong consumer approval and so the client commissioned semiotic research to account for the campaign's poor reception. These kinds of problems usually begin upstream in the strategic positioning process so I proposed an investigation of the campaign's strategic semiotic relationship to the brand legacy, the competitive environment, the coffee category generally and consumer culture. The campaign is then evaluated on the basis of its potential to support and strengthen the brand's core identity and positioning within the category.

Since strategic semiotic research identifies the dominant discourses structuring meaning and value in a product category, the data set includes a large set of ads drawn from the brand's history, the competitive set and the coffee category generally, including all formats and price points. The data also includes the packaging designs represented in the ads.

The data analysis begins by decoding individual ads and tracing the recurrence of the codes across the data set. Ads are then grouped in categories based upon the similarity of their code systems. For instance, the binary "elite/popular" differentiates premium brands from mass brands and is represented by a distinct set of symbolic cues, from color to characters. The visual semiotics of each category is then matched with a corresponding value proposition, i.e., bright primary colors consistently represent mass brands; more nuanced colors consistently represent premium brands. Usually these codes are not reserved to any particular category within food and beverage but also structure the perception of value across multiple categories, from coffee to dairy and packaged snacks.

By identifying these codes and classifications, the semiotician develops a set of tools for decoding and assessing specific advertising campaigns or new product concepts. In other words, though the research-

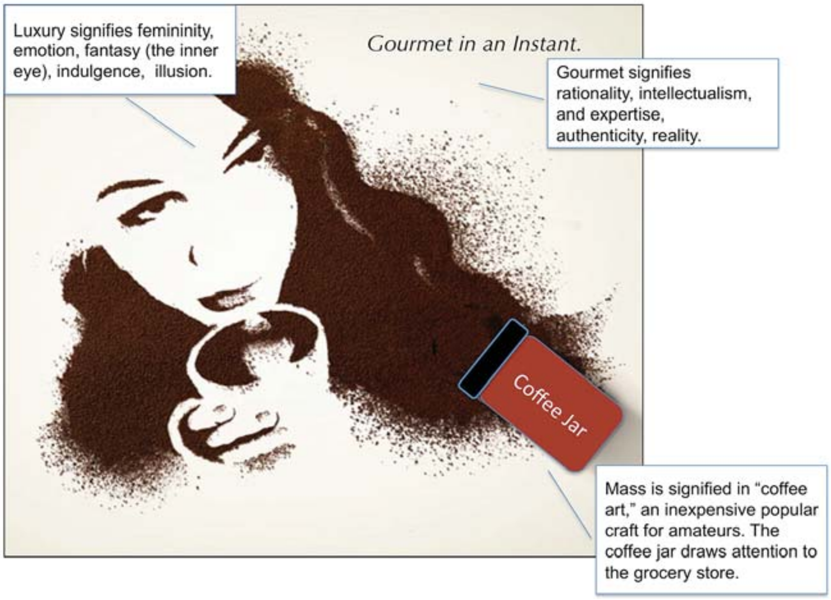

Figure 2: Code-mixing in the Instant Gourmet ad.

Table 2: The Semiotic Dimensions of the Coffee Category

	Gourmet Brands	Mass Brands	Luxury Brands
Brands	Peet's, Intelligentsia, Gevalia	Folgers, Maxwell House	Starbuck's, Seattle's Best
Value Proposition	The beans. Product authenticity, integrity. Expertise, coffee for coffee's sake.	Everyday low price. Good flavor, reliable. Warmth and energy.	Creativity. Pleasure, creativity in preparation and presentation.
Culture	Masculine, realistic, understated, intellectual.	Social, domestic, comfortable, not gender-specific.	Fantasy. Pleasure, relaxation, pampering, fun, feminine.
Signifiers	Dark earth tones, unadorned, serious, the art of coffee.	Coffee as metaphor for emotional benefits. Coffee as art, bricolage.	Feminine. White, pastels, fantasy, the art of presentation.
Target Segment	Coffee aficionados, connoisseurs, sophisticated shoppers.	The mass market.	The premium coffee-lover seeking a sweet, hot beverage with an espresso boost.

er's past experience with a category sharpens their approach to a project, the semiotician does not rely upon prior knowledge to assess the strategic strength of a marketing campaign or new product concept. They acquire this knowledge in the course of an exhaustive semiotic analysis of the brand, the category and consumer culture related to each project at a given time and in a given market.

For example, the binary "mass/premium" defines a primary value classification of coffee brands. Within the premium category we identified two distinct cultural positionings, gourmet and luxury (Table 1). We also identified a consistent set of signifiers for each classification. Mass brands are associated with bright primary colors, domestic settings and families; gourmet brands are associated with dark browns and greens, connoisseurship and individuals or couples; and luxury brands are associated with whites and pastels, self-indulgence and fantasy.

Compared and contrasted

We began by assessing the ad's consistency with the brand's emotional legacy, as communicated in a set of historical ads and package designs going back 10 years. We then compared and contrasted the emotional positioning of the ad in relationship to current advertising and packaging for competitors in the instant coffee category, including Starbucks Via, Medaglia d'Oro and Nescafé. To decode the perception of value in the category, we also analyzed a broad collection of ads and packaging for all kinds of coffees across the category, including instant, brewed and espresso brands.

The semiotic analysis traces patterns in the data set formed by recurring associations between specific semiotic cues such as color, shape or rhetorical style – and specific meanings. If the historical advertising consistently associated the brand with self-indulgence, for example, we expect the new campaign to support the brand's historical positioning. If advertising and packaging for the coffee category consistently associated the colors dark green and brown with a "gourmet" positioning (i.e., connoisseurship, intellectual, etc.), we inferred that dark green and brown were signifiers for the value proposition "gourmet."

We then codified findings from the advertising analysis by classifying by them into binary pairs by cultural category, including sector, experience, value proposition, quality perception, mood state, gender and cultural capital. For instance, mass brands consistently use bright primary colors and practical settings to communicate their everyday, economical positioning, in contrast with the more subtle hues and sophisticated, rarefied environments used by premium brands. The analysis exposed a cultural paradigm at play in the mass brand category.

In contrast, the premium category references elite culture. It also includes two subcategories, gourmet and luxury. Analysis of a large set of coffee ads revealed a basic contrast between the dark green, brown and red color scheme of gourmet brands and the white and pastel color scheme of luxury brands. In fact this general color code prevailed in peripheral premium categories, from gastronomy to fashion. We expanded the "dark green-brown/white-pastel" binary into a paradigm classified by cultural category, including sector, experience, value proposition, quality perception, mood state, gender and cultural capital. The paradigmatic analysis reveals the deep strategic implications of a mismatched signifier for communicating the brand's value proposition, identity and culture. Imagine trying to target the demanding, intellectual gourmet connoisseur using signifiers for the ostentatious, pleasure-seeking luxury consumer. In fact, that is precisely where the Instant Gourmet ad went awry.

Armed with the codes structuring meaning and value in the gourmet, luxury and mass coffee brand categories, we were ready to assess the clarity and consistency of the messaging in the Instant Gourmet campaign. As suspected, the semiotic analysis identified three distinct code systems referencing three cultural brand positionings, including gourmet, luxury and mass brands (Figure 2). As shown in Table 2, they include the luxury code system: feminine, dreamy (the inner eye), illusion, fantasy and fashion; the Gourmet code system: masculine, rational, reality, authenticity, gastronomy; and mass code system: amateur crafts (coffee art), references to the real (the real coffee jar).

Lacked a clear focus

In summary, the Instant Gourmet campaign failed in its strategic function because it lacked a clear focus on the brand's core value proposition, i.e., an instant coffee with the quality and taste of a premium brewed coffee. Consumers' responses to the ad confirm this principle. They detected ambiguity in the campaign and gave it low scores, in spite of the ad's attention-grabbing esthetics.

One might ask how consumers, though not trained in semiotics, can detect ambiguity in a marketing campaign. In the same manner that humans learn language by repeated exposure to the language in daily life, consumers learn the codes structuring meaning in a category by means of routine, lifelong experience reading packaging, advertising and merchandising in the quest to satisfy their needs. Packaging codes guide consumers through their choices at the point of purchase because they structure consistent expectations about the value and cultural positioning of the product inside. Shoppers have learned from experience to identify processed snacks on the shelf by the bold colors and hyperbolic language on packaging. They also recognize contrasts between processed and natural snacks, with their earth tones and realistic claims. These codes define a kind of shorthand for consumers, enabling them to sort through the supermarket aisle with a quick sweep of the eyes down the supermarket aisle.

Basic truths

The case study highlights basic truths about marketing semiotic research and its implications for brand value.

1. Though semioticians draw upon their expertise to design and execute a study, the specific codes and classifications structuring meaning in a product category or market emerge in the course of a meticulous analysis of a large set of data, not from the researchers' subjective mind.

2. Though marketing semiotics uses textual analysis to decode the individual units of a data set, the semiotic study is designed to transcend the analysis of any given text and understand a campaign or new product concept in relation to the codes organizing meaning and value in a product category or market.

3. The scope of marketing semiotics is not limited to advertising research but applies to any form of marketing communication, from consumer interviews and ethnographic observations to packaging and retail design.

4. Value-driven semiotic research is not a quick and superficial process. It demands expertise and attention to detail to gather and analyze category data and distill findings into actionable strategic recommendations for branding, advertising and design.

Laura Oswald is founding director of Chicago-based Marketing Semiotics. She can be reached at loswald@marketingsemiotics.com.

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customer experience research

Watch and learn

Quantitative tools for measuring consumer reactions and behavior

| By Leanne W.S. Loijens

snapshot

Pair these techniques with traditional methods for a complete view of your customers' experiences

Customer experience research is growing in popularity. For companies and service providers it is crucial to listen to customers and find out what their needs are. Customers have become more demanding and new product development is increasingly characterized by close interactions between producers and consumers. Even co-development is common practice nowadays.

How do you know how your customers experience your product, service, shop, museum, etc.? You can ask them, of course. This is done in traditional market research with techniques like questionnaires, surveys and focus groups. Asking questions seems simple but the answers you get are not always very useful. Why not? "Experiencing" is largely a subconscious process. When you ask people how they experienced your service, they may not know or cannot articulate their thoughts and feelings. People may also want to please you. They may not like your product very much but they may not want to offend you and will say "Yes, I will probably recommend it to other people."

What is also important is that many market research studies are done in a lab. Companies invite a number of test participants to come to their facilities and try a number of prototypes of, for instance, a new type of yoghurt. It is often not so difficult for the test participants to choose the prototype they like best but if you ask them why they chose Option A over Option B, the odds are that they have no idea (but they may make up something really good!). Choosing from three prototypes in a lab is, of course, very different from a real-life situation in a supermarket with many brands and packages that may influence choice as well.

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Additional techniques are needed

It is generally accepted that questionnaires, interviews and focus groups have their drawbacks and that additional techniques are needed. In addition to asking people questions, companies move more and more towards observing people in real-life situations. By measuring quantitative data with techniques like eye-tracking, video recording/coding, indoor tracking, facial expression analysis and physiological data measurement, you can get a good, objective impression of what a customer experienced. Based on these data, you can ask questions about the subjective experience of the customer.

Video recording/coding. Observing people in a supermarket or at home can give you a wealth of data. You can use, for instance, camcorders and position them in such a way that you can cover the whole shop or kitchen. The data storage capacity of present-day camcorders is in the gigabyte range which means that you can easily record 8-10 hours. Coding of the videos needs to be done manually. You can use dedicated coding software/services including analysis of the data. You can observe whether people stand still at a shelf and look at your products, take products from the shelf to have a closer look and put them in their shopping basket. In addition to this detailed observation you can also code how people walk through the shop, what route they take and what the hotspots are.

Our firm used videorecording in one of our research projects. The aim of the study was to assess how elderly people in a nursing home experience their dinner and whether their food intake increases when the dinner conditions are optimized. The control group was offered standard meals. For the people in the experimental group, the dining room was altered (tables with table cloths and candles instead of bare tables), there was more interaction between the staff and the elderly during the meal and the meals themselves were of a higher quality. People were observed two days per week for a period of 12 weeks, starting with a four-week control period. During the study the staff asked people about their experience in a number of interviews. During the control period meal satisfaction (taste, appearance, ambience) was rated as good in both groups. This remained unchanged in the control group. There was a significant increase in meal satisfaction in the experimental group. This was reflected in a longer meal duration in this group. Food intake increased in the experimental group. The participants consumed more vegetables (+32 percent) and more potatoes and pasta (+29 percent). The body weight of the experimental group increased (+0.6 kg) while in the control group there was a slight decrease (-0.4 kg).

Indoor tracking. You can also use indoor-tracking systems to get data on shopper routes, dwell times and hotpots. You can use real-time location systems like ultra-wideband or video-based systems. With ultra-wideband each shopper wears a tag (or the tag is integrated in the shopping basket); with video-based systems a tag is not necessary. In the future, tracking may be combined with experience sampling with questions popping up on the customer's smartphone when he/she is in a certain area.

Eye-tracking. To get insight in what your customer sees, you can use eye trackers, either eye-tracker glasses or eye trackers built into your shop. Noldus IT carried out an experimental eye-tracker test together with the principal Dutch railway operating company. The aim was to assess how passengers experience their train journey. Two travelers were followed, one traveler (the Must traveler) used the train to travel from home to an appointment for his work, the other one (the Lust traveler) had a day off and was going on an outing. Both travelers started at Amsterdam Central station. The Must traveler had a deadline to meet the test leader outside the train station in Utrecht before noon. The Lust traveler could take any train to Utrecht and did not have a deadline. Before catching the train both passengers had to buy a train ticket, a sandwich/snack (in Shop 1), coffee/tea/soft drink (in Shop 2) and a present (in Shop 3). Both passengers were equipped with eye-tracker glasses and a smartwatch that measured GPS and heart rate.

After the test, the gaze videos were manually coded. The behaviors that were scored included: searching (in the station hall, on the platform, in the train, in the shops) and gathering information (from paper, from notice board, from mobile phone, from map, from route planner sign). The travelers were asked to fill in a questionnaire when they had reached their destination to get an impression of their subjective train journey experience.

Of course, it is difficult to draw conclusions based on the data of only two passengers but the test made it clear that by combining quantitative and qualitative techniques, one gets a good impression of what the travelers experience during their train journey and how they experience it.

Facial expression analysis. Reading people's facial expressions is what you do in everyday life to see whether they like something or not. Even subtle changes in facial expressions can give people away. There is professional software available that can automatically read people's facial expressions and can tell you whether people look, for instance, neutral, happy, surprised or disgusted and how intense the emotion is. Even the activity of individual muscles or muscle groups (such as for instance, nose wrinkling) can be detected.

Physiological data measurements. Physiological data are important in experience research because consumers' emotional responses generally co-occur with physiological responses. It has, for instance, been shown that heart rate increases in response to emotions such as anger and fear and decreases in response to disgust. Skin conductance is a method of measuring the electrical conductance of the skin which is used as an indication of psychological or physiological arousal. In addition to heart rate (ECG) and skin conductance you can also measure parameters like muscle tension (EMG) or neuronal activity (EEG).

Virtual supermarket. The above-mentioned techniques can be combined in a virtual supermarket, which may be a good alternative to tests in a real supermarket. The virtual supermarket may consist of a number of computer screens and a PC on which a software package runs that simulates the supermarket. As a researcher you can change the product range, shelf layout, prices etc. Eye-tracking can be used to assess what the shopper looks at and physiological and brain responses can be measured. The virtual supermarket can be used to investigate why consumers like or dislike certain products and how the choice and purchase process works.

Advanced data analysis. You do not always need complex statistical analyses to get an impression of how your customers experience your products. For instance, with edible products you can measure how fast people eat/drink. The speed of eating/drinking and the bite size can give a good impression of how much your customers like the product.

The Austrian Post carried out a study in its post offices before and after they were renovated. Prior to the renovation people had to wait in line for their turn. The post offices underwent a complete makeover. They were equipped with a coffee corner, a play area for small children and a table with magazines. In addition, a ticket system was introduced. Interestingly, people had the feeling that the waiting time was shorter after the renovation while objective measurements made it clear that the actual waiting time was longer.

Sometimes advanced statistical analysis is a must to get the insights you need. When tracking people in a shop, for instance, it is good to know how often and how long they visited each zone in the shop (and make heatmaps) but it is also interesting to calculate the most-used route through the shop in a sequential analysis. Pattern analysis may also be of interest. Human behavior is often highly structured but people may vary in their routines and it can very well be that people with different routines experience products differently.

Bringing the pieces together

As we have seen, there are several techniques available to get a good indication of consumer experience. Combining methods is crucial to gain insight into something as complex as experience. Each method (including the traditional ones like interviews and questionnaires) can give valuable information. The combination is like bringing the pieces of the jigsaw puzzle together.

Leanne W.S. Loijens is a behavioral research consultant at Noldus Information Technology BV, Wageningen, The Netherlands. She can be reached at l.loijens@noldus.nl.

special advertising section

26 TOP PHARMACEUTICAL MARKETING RESEARCH COMPANIES

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Founded 2010 | 52 employees
Vrinda Deval, Managing Partner

GLocal Mind provides global health care recruitment and support services by leveraging our proprietary panel of 1.5 million physicians and allied health care professionals. With a good understanding of local markets, we work collaboratively to support our clients' qualitative and quantitative research needs. Our robust and diverse global panel includes physicians across specialties, opinion leaders, nurses, dentists, veterinarians, ophthalmologists, opticians, pharmacists, payors, all managed by an internally-designed panel management system. GLocal Mind's support services range across programming, hosting and translation, scheduling, moderation, data processing, custom charting, report writing, content analysis and incentive handling across 50+ countries including key markets in the U.S., Canada, EU5, APAC, Latin America and Middle East.

Phone 646-290-6655
www.glocalmind.com

Health Strategies Group

Founded 1992 | 80 employees
Rod Cavin, Managing Director

Health Strategies Group is the leader in market access intelligence and research for biopharmaceutical professionals. From health plans to IDNs to ACOs, we transform syndicated and custom research results into practical knowledge and strategic recommendations so you can move confidently ahead.

Custom Access Insights from Health Strategies Group brings an advanced set of global market access capabilities, frameworks and methods, plus our robust panel, to answer your specific market access questions across the product lifecycle from clinical development to loss of exclusivity.

Phone 949-242-1035
www.healthstrategies.com

RC Horowitz & Company Inc.

Founded 1983 | 5 employees
Rob Horowitz, CEO

Creative experts in low-incident, complex, challenging health care recruiting. Rare diseases, doctor-patient observations, ethnographies, with well-vetted, validated fresh respondents. Over the past three decades we've built a reputation as a premier focus group recruiting and fieldwork management service for discerning clients worldwide. We specialize in health care and most consumer audiences and understand the dynamic needs of qualitative research. Meeting challenging deadlines and finding creative solutions to meet your objectives are a specialty. We've developed a reputation of successfully completing the "undoable" and enjoy tremendous success because we recognize that we are measured one study at a time. We have stringent quality control and a personal commitment to the success of every project.

Phone 212-779-0033
www.rchorowitz.com

Jackson Adept – Beverly Hills

Founded 1957 | 30 employees
Angela Lorinchak, President

With over 15,000 feet of research space, including 10 rooms across two locations in Los Angeles, Jackson Adept Research has been a top choice for health care research since 1957. With full-time, dedicated recruiters and a database of 200,000 potential participants, even the most challenging audience is achievable. Hundreds of physicians are "on call" for Jackson, including PCPs, oncs, cards, rheums, infectious disease, OBGYNs and allergists. But it's really our experience that sets us apart; our average manager has more than a decade in research, which means less work for our clients. For health care research in LA or Atlanta, Jackson is the one to trust.

Phone 310-279-4600
www.jacksonresearch.com

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 has been a top choice for health care research since 1957. With full-time, dedicated recruiters and a database of 200,000 potential participants, even the most challenging audience is achievable. Hundreds of physicians are "on call" for Jackson, including PCPs, oncs, cards, rheums, infectious disease, OBGYNs and allergists. But it's really our experience that sets us apart; our average manager has more than a decade in research, which means less work for our clients. For health care research in Atlanta or LA, Jackson is the one to trust.

Phone 770-394-8700
www.jacksonassociates.com

JS Martin Transcription Resources

Founded 1995 | 30+ employees
Jay Martin, Founder

We offer transcription for focus groups and IDIs. Most recent work has been for the pharmaceutical industry for a variety of clients. In addition to transcription and quality-control insuring the highest-quality transcripts, our technical staff offers support for audio and video files to include conversion to other formats. We are now also certified to offer transcription to government agencies and, owing to security requirements for agencies like the VA, we receive and transmit files via FIPS 140-2 Certified SFTP Pragma Server to meet strict government security standards. Competitive rates and rush service available.

Phone 818-691-0177
www.jsmartintranscription.com

Lightspeed Health

Founded 1996 | 700 employees
Jennifer Carrea, CEO

Lightspeed Health is a specialized agency providing access to key health care stakeholders for both your quantitative and qualitative research needs. The complex global health care industry requires knowledgeable experts to advise clients on how to best reach their target audience and illuminate insights. Through our dedicated and experienced health care specialists, Lightspeed Health pushes the boundaries of online innovation across methodology with seamless execution. Through our heavily-vetted physician and patient panels, we deliver a broad range of global health care solutions, including full-service fieldwork, survey design consultation and programming services.

Phone 908-605-4500
www.lightspeed-health.com

M3 GLOBAL RESEARCH

M3 Global Research

Founded 2006 | 20+ employees
Amber Leila Esco, CSO

M3 operates in the Americas, Asia and Europe with 3.5 million+ physician members via our medical portals. Within the health care/life science industry, M3 focuses beyond market research with medical education, ethical drug promotion, clinical development, job recruitment and clinic appointment services. M3 Global Research provides the most comprehensive and quality research recruitment and support services available industry-wide with relationships reaching respondents in over 70 countries. M3 maintains ISO 26362 and 27001 certifications and provides management services that cover the spectrum of research methodologies utilized today. Beyond HCPS, M3 creates and maintains panels of patients and caregivers.

Phone Quantitative: 844-M3-QUANT; Qualitative: 844-M3-VIEWS
www.m3globalresearch.com

Medscape
WebMD Professional

Medscape Market Research

Founded 1995 | 1,800 employees
Audrey Rosen, Vice President, Market Research

For over 20 years, Medscape Market Research has provided industry-leading recruitment and research solutions so you can deliver dynamic market research to clinicians no matter the device. By leveraging first- and third-party data, and utilizing our broad professional network of highly engaged health providers, we deliver the results you are looking for.

Phone 212-301-6700
www.medscapemarketresearch.com

MedSurvey

MedSurvey

Founded 1976 | 24 employees
Paul Golota, CEO

MedSurvey helps organizations gather quality health care data by conducting surveys with knowledgeable health care professionals and patients. For over 40 years, MedSurvey has been a leader in the recruitment of health care respondents for medical surveys. Our best-in-the-business recruitment techniques that leverage our deep relationships with the medical community and our focus on creating outstanding participant experiences means faster project completions, better data and happier clients.

Phone 866-963-3000
www.medsurvey.com

Olson Research Group Inc.

Founded 1995 | 60+ employees
Charles Olson, CEO

Olson Research offers a full spectrum of qualitative and quantitative market research services with deep access to a robust proprietary database of 2.4 million U.S. health care professionals throughout the life sciences sector, including 960,000 active physicians. Precise targeting is available with up to 75 unique profiling fields. We are best known for: access – our unique and thorough reach to all facets of the U.S. health care decision maker population; experience – our team of seasoned PMs having on average 8+ years of industry experience; and approach – our flexible and collaborative approach to project design, fielding and final deliverables.

Phone 267-487-5500
www.olsonresearchgroup.com

Pinnacle Research Group

Founded 2002 | 10 employees
Tanya Mingione, CEO

Pinnacle Research Group is a think tank of educated, intelligent, forward-thinking professionals (psychologists, sociologists, marketers) who specialize in the health care/pharma industry. We combine psychological insight and theories with real-world experience to take your research efforts further. Our unique approach provides deeper exploration and understanding of motivations, behavior and perceptions. Our philosophical approach is simple: dig deep. Leave no stone unturned. Provide a fresh perspective to clients. Do it all while maintaining an intense focus on quality and excellence. We are seasoned professionals who are intuitive, sensitive, observant and have a thorough understanding of human behavior.

Phone 573-547-3358
www.pinnacleresearchgroup.com

Rabin Research Company

Founded 1963 | 20 employees
Michelle Elster, President

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

Phone 312-527-5009
rabinresearch.com

Reckner Healthcare

Founded 1991 | 225 employees
David Reckner, CEO

Reckner Healthcare provides complete fieldwork solutions for pharmaceutical and medical marketing research projects. Serving clients for more than 25 years, the company specializes in delivering access to physicians, allied health care professionals, payors, decision makers and opinion leaders across the United States and the world. Reckner has its own independently-maintained panel and internally-designed panel management system, making it one of the industry's most robust, respected health care panels. Providing fast access and easy platform linkages, Reckner offers recruiting and scheduling for qualitative and quantitative health care research projects. Services include list-matching, recruitment, scheduling, verbal confirmations, programming, hosting and project, segmentation and honoraria/1099 management.

Phone 215-822-6220
www.recknerhealthcare.com

ReRez

Founded 2002 | 10 employees
Debbie Peternana, CEO

Hemophilia A and B, cystic fibrosis, cancer stages 1-4 – ReRez specializes in finding difficult audiences. As global online specialists and methodology consultants, we offer solutions for all your needs: patients; physicians (national and international); hard-to-target ailments (ostomy, MS, lung cancer, Willebrands, etc.). Small studies or large, if your need is simply programming, online real-time reporting or just panel research, you can always count on ReRez to offer fast turnaround, flexible pricing and accountability to deliver what we say we are going to do. Remember, if we can't do it, it cannot be done!

Phone 774-212-0033
www.rerez.com

RESULTS, GUIDANCE + ACTION

RG+A

Founded 1997 | 25 employees
Roger Green, President/CEO

For over 25 years, RG+A has been partnering with biotechnology, pharmaceutical, medical device and diagnostics companies to provide high-value marketing research and consulting in support of key issues in product commercialization, including demand forecasting, pricing optimization, product valuation, positioning and contracting strategy. RG+A is the pioneer of Dynamic Practice Simulation™ – the industry's first patient treatment simulation research system – as well as several other leading-edge qualitative, quantitative and modeling methods. Our experience applying unique and creative approaches to solve complex problems has earned RG+A a reputation as an industry innovator and trusted advisor when facing the industry's most challenging issues.

Phone 267-744-6411
www.thinkrga.com

Schlesinger Associates
Quality Without Compromise

Schlesinger Ascts. Inc.

Founded 1966 | Circa 600 employees
Steve Schlesinger, CEO

Schlesinger is a leading data collection company specializing in pharmaceutical marketing research and offering a broad range of qualitative and quantitative research solutions. Our top-rated facilities are located in key markets across the U.S. and the E.U. Working in partnership with you, we provide outstanding recruitment and project management for any methodology. MedQuery|Advisors connects knowledge-seekers with health care thought leaders and the toughest health care recruits. Schlesinger Global Solutions supports your worldwide health care studies with a dedicated expert contact. Schlesinger recently launched The Wall by Schlesinger, a breakthrough solution to qualitative engagement and post-research synthesis.

Phone 732-906-1122
www.schlesingerassociates.com

Segmedica® Innovation In Research
An xsperient company

Segmedica Inc.

Founded 2004 | 24 employees
Peter Simpson, CEO

Segmedica|xsperient is a full-service global medical and health care market research company using advanced techniques for qualitative, ethnographic and quantitative studies with HCPs, payors and patients. Our unique methodologies, such as self-moderating research or the capturing and analysis of

in-office conversations between HCPs and patients, set us apart from the rest. We are the leading company in the field of applying the measurable sciences of psychology, anthropology, sociology and linguistics to health care market research and market segmentation. We also offer ConnexionPoints® syndicated reports. Ask for a Webinar or presentation on how we can help you with your market research needs.

Phone 716-754-8744
www.segmedica.com

Shugoll Research

Founded 1947 | 65 employees
Rick Seale, Executive Vice President

Shugoll Research provides access to the largest database of medical professionals in the Washington, D.C., Maryland and Northern Virginia area. Our HCP panel has a diverse range of specialties and practice settings and our patient panel tracks over 100 different ailments. We provide medical recruiting for in-person research and telephone and video interviews. The D.C. market is home to three university medical centers, 37 hospitals and thousands of doctors and nurses. Each member of our experienced medical project management team has managed hundreds of specialty pharma studies. We promise and we deliver.

Phone 301-656-0310
shugollresearch.com

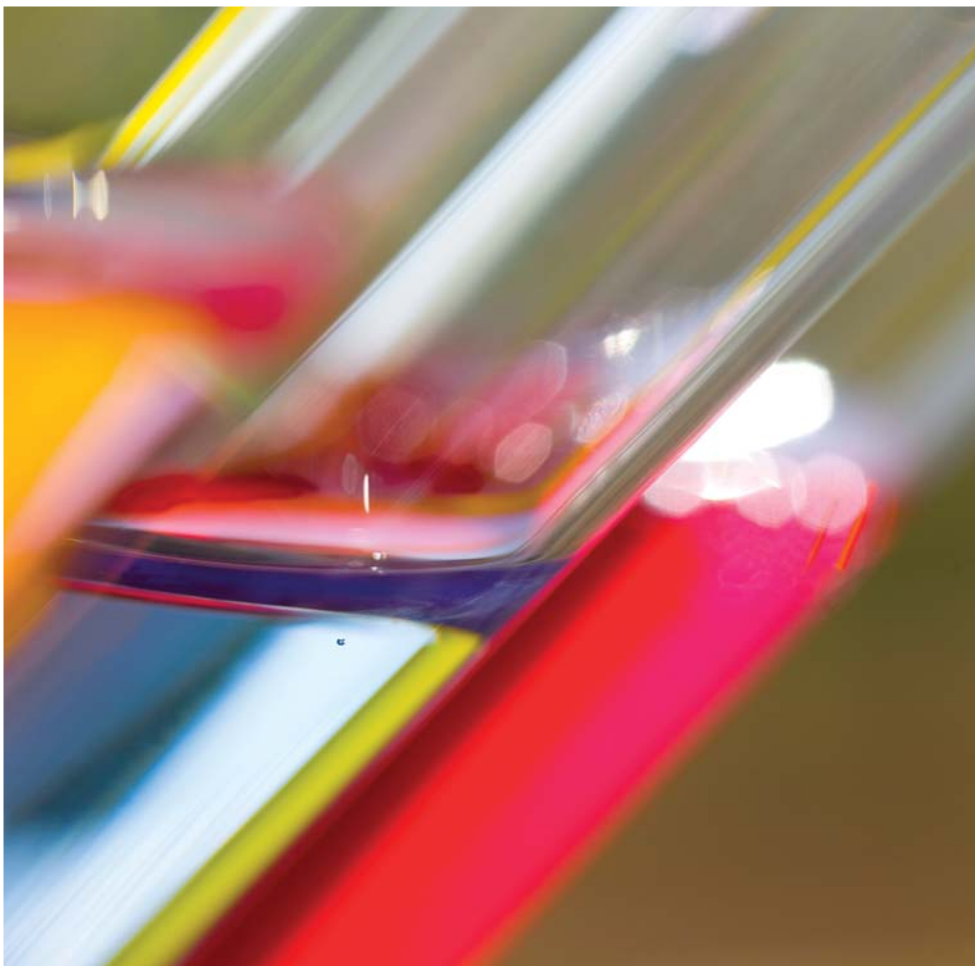
Toluna Healthcare Practice

Toluna Healthcare Practice

Founded 2000 | 1200+ employees
Steve Orlick, VP, Healthcare

Toluna's Healthcare Practice has been providing health care and pharmaceutical research practitioners with access to medical professionals of all specialties, as well as ailment sufferers, since 2000. The practice recently launched new products designed to meet the unique needs of health care and pharmaceutical clients, such as RapidResultsRx, our new approach to quick-turn insights amongst health care professionals and patients; Point of Care, our approach to finding hard-to-reach, rare to ultra-rare patients in a physician-controlled environment; and PowerConcept: our automated concept testing technology, now powered by pharmaceutical benchmarking norms. Toluna is a leading provider in on-demand, real-time digital consumer insights with a focus on innovation in research technology.

203-834-8585
www.toluna-group.com/healthcare



Names of Note

■ Media company *Viacom Inc.*, New York, has appointed **Colleen Fahey Rush** as executive vice president, insights and audience science and chief research officer of Viacom Media Networks.

■ Menomonee Falls, Wis., retailer *Kohl's* has appointed **Greg Revelle** as CMO.

■ *Hanover Research*, Arlington, Va., has appointed **Vineeta Mooganur** as chief growth officer.

■ Marketing technology firm *Adestra*, London, has appointed **Bradley Shore** to its board of directors as chief finance officer.

■ Researcher *Toluna*, Wilton, Conn., has hired **Jay Rampuria** as executive vice president global business development. Rampuria will lead global business development for Toluna and parent company ITWP.

■ Plano, Texas, firm *Research Now* is building its business and research team dedicated to advertising campaign measurement, effectiveness and audience validation. New team members include: **Heather O'Shea**, vice president of global research; **Andrea Giese**, senior research manager; **Bill Jaris**, business development director; and **Kara Kramer**, account team lead.

■ **Diane Hessan**, chairman of market research company *C Space*, has been elected to Boston-based cloud services provider **Brightcove**'s board of directors.

quirks.com/articles/2017/20170613.aspx

■ U.K. research video platform *Voxpopme* has appointed **Jem Wallis** as regional director of Asia-Pacific. Wallis will be based in Sydney.


Gordon

■ Atlanta-based researcher *CMI* has added **Alynn Gordon** to its client services team as a research associate.

■ *The International Institute for Analytics*, headquartered in Portland, Ore., has named **Bill Franks** as its chief analytics officer.

■ Canada-based agency *Bond Brand Loyalty* has promoted **Morana Bakula** to vice president, customer experience.

■ San Francisco-based predictive intelligence platform *6sense* has appointed **Arun Shrestha** as chief customer officer.

■ Nuremberg, Germany, researcher *GfK* has appointed new team members to support its newly-launched GfK Customer and Audience Activation service. Based in London, **Niko Waesche** will head up the new service. Also appointed are **Cornelia Reitinger** as director of business development and **Lauren Coppin** as director of data partnerships.

■ *The Broadcasters' Audience Research Board*, based in London, has appointed **Joe Lewis** as head of insight.

■ New York-based marketing analytics firm *Analytic Partners* has hired **Joseph LaSala** as vice president of marketing and **Tom O'Sullivan** as SVP, global business development.

■ Research Triangle Park, N.C., marketing technology company *Netsertive* has promoted **Kevin Fitzgerald** to COO and hired **Jim Doherty** as executive vice president of sales and marketing.

■ **Arjen van Duijvenbode** has been appointed CEO of Vienna, Austria, researcher *Talk Online Panel*.

■ Canada-based research and polling firm *Leger* has appointed **Sandie Sparkman** as vice president, Leger Metrics. Sparkman will lead the company's technological real-time solutions division.


Brown

■ Stockholm-based software company *Cint* has appointed **Johanna Isander** as chief human resource officer.


McDiarmid

■ Durham, N.C., research firm *W5* has hired **Grace Brown** as client relations consultant and **Ian McDiarmid** as practice consultant.

■ **Chris Kuist** has joined the *Interactive Advertising Bureau*, New York, as senior vice president of research and impact.

■ Bethesda, Md., researcher *Abt Associates* has named **Jorge Elguera** as chief information officer.

■ *Consumer Reports*, Yonkers, N.Y., has named **Matt Anchin** as vice president and chief communications officer.

■ St. Paul, Minn., engagement and loyalty platform company *Augeo* has hired **Scott Moore** as chief operating officer.

■ In the U.S., health care research agency *Cello Health Insight* has reorganized its senior operations with the appointment of **Kathryn Gallant** as CEO and **Angie Wheeler** as president. Additionally, **Justine Trinidad** has been hired as U.S. director of IQ, the firm's specialist quantitative research practice; **Ed Geiselhart** has been hired as a Chicago-based director; and **Kaity Arctander** has been hired to help expand the firm's expert offering.

■ *GfK*, Nuremberg, Germany, has appointed **Thomas Ebeling**, CEO of ProSiebenSat.1 Media SE; **Johannes P. Huth**, head of KKR's operations in Europe, the Middle East and Africa; and **Philipp Freise**, head of technology, media and telecommunications of Europe at KKR, as members of the supervisory board. They succeed **Peter Goldschmidt**, **Aliza Knox** and **Bruno Piacenza**, who resigned as of March 31. KKR, which acquired an 18.54 percent stake in GfK in February, has assumed three seats on the supervisory board. GfK says this does not change the supervisory board's previous set up of six shareholder and four employee representatives.

■ **Tom Dailey** has joined New York-based research and analytics firm *M Science* as head of corporate information services.

■ Researcher *Gazelle-GoSample!*, New York, has reached an agreement with Wilmington, N.C., firm **Lookout Online** and its founder **Bruce Ritch** under which Ritch will join forces with Gazelle-GoSample! in an advisory business development role as director, insight solutions.

■ **Emily Palermo** has joined *Drive Research*, Syracuse, N.Y., as a research analyst.

■ In Bloomfield Hills, Mich., **Frank Forkin** has been promoted to president of Ipsos RDA. Forkin succeeds **Donald Pietrowski**, who announced his retirement after more than 30 years with the firm.

■ New Hope, Pa., health care research and consulting firm *RG+A* has announced new hires and promotions: **Joan Lorgus** has joined as vice president for client development; **Timothy Deckman** has assumed leadership over the company's Research Center of Excellence as chief marketing scientist; **Amy Krutsick** has been promoted to associate director and **Diana Kuritza** has been promoted to senior research analyst, both within the firm's Research & Client Service Group; **Alex Graber** has joined as senior manager, marketing science in the Research Center of Excellence; and **Lindsay Hoover** has joined the firm as research analyst.

■ Omnichannel data firm *V12 Data*, Red Bank, N.J., has appointed **Karen Mascott** as CMO.

■ **MaryKay Kopf**, CMO and member of group management for appliance company *Electrolux*, headquartered in Stockholm, left her position on May 1. The company appointed **Lars Hygrell**, senior vice president marketing and brands within the business area Major Appliances Europe, Middle East and Africa, as her successor.

■ *MICA*, an India-based management school for strategic marketing and communication, has appointed **Ashutosh Dutt** as an associate professor. Dutt's area of expertise is marketing research and analytics and his course offerings include quantitative techniques, business analytics, multivariate data analysis, marketing research, online research and pricing research.

■ New York researcher *SHC Universal* has named **Phil Sofia** as the company's new president.


Sofia

■ *The American Institute of Artificial Intelligence*, Washington, D.C., has hired **Tiffany Harrison Parker** as COO.

■ **Jennifer Hall** has joined Honeoye Falls, N.Y., research firm *KJT Group* as vice president, global sampling and field operations.

■ Troy, Mich., business-to-business media company *BNP Media* has promoted **Rebecca Merrell** to associate project manager. Additionally, **Ulka Bhide** has been promoted to associate research manager in the BNP Media Market Research Group.

■ In Los Angeles, researcher *Kelton Global* has promoted **Sarah Stone** to CMO. Stone will continue to serve as a strategic consultant to Kelton clients while leading the firm's marketing and content development.

■ Nonprofit organization *Women in Research*, Los Angeles, has added four new members to its advisory board: **Laura Chaibi**, head of digital research for MBC based in Dubai; **Anthony Michelini**, global head of brand insights and strategic analytics for CitiGroup in New York; **Vanessa Oshima**, general manager, women's category, for Nike in Tokyo; and **Fiona Blades**, chief experience officer at MESH Experience in New York. After completing a two-year service term, advisory board members **Elaine Coleman** (CA Technologies), Ashley Chauvin (Citi) and **Emily Della Maggiora** (consultant) will transition to emeritus board members.

■ *CMS Research*, Toledo, Ohio, has promoted **Jeff Cummins** to president, while **Jim Cummins** will take on the role of consultant. In addition, **Jim Torsok** has joined the firm as vice president.

■ **Christina Halligan** has joined Roswell, Ga., firm *MMR Research Associates* as director, client services.

■ Plano, Texas, firm *Research Now* has hired **George Pappachen** as executive vice president, corporate development and strategy, a newly-created position.

■ **Barbara Deradorian** has joined Rhinebeck, N.Y., research and consulting firm *Phoenix Marketing International* as executive vice president and client advisor.

■ In Doylestown, Pa., *Adelphi Research Global* has hired two senior team members for its advanced analytics department: **Paul Teta** as chief methodologist and **Ted Noga** as director of advanced analytics. In addition, three individuals recently joined the firm's project teams: **Amy Gilpin**, senior project director; **McKenzie Ballou**, project director; and **Erin Zekas**, research associate. Lastly, five project team members have been promoted: **Hillary Gross** to senior project director; **Josh Thornbrough**, **Tom Bebee**, **Alyssa Murphy** and **Emily Chaundy** to project director.

Research Industry News

News notes

■ In September, **Santa Clara University's Leavey School of Business** will begin offering a new product marketing and product management certificate program.

■ **TRC Market Research**, Philadelphia, celebrated its 30-year anniversary on April 1.

■ Qualitative research and branding consultancy **Talking Business LLC**, Newport Beach, Calif., led by founder Holly O'Neill, celebrated its 20-year anniversary in March.

Acquisitions/transactions

■ Stamford, Conn., researcher **Gartner Inc.** has completed its acquisition of Arlington, Va., insight and technology company **CEB Inc.**

■ **Yelp**, San Francisco, has acquired Toronto-based Wi-Fi marketing company **Turnstyle Analytics Inc.** Turnstyle's technology lets consumers tap into free guest Wi-Fi while helping businesses re-engage those customers in the future via e-mail. Combining the offline data with Yelp's online and mobile search data will provide an intent-based marketing resource to local businesses.

quirks.com/articles/2017/20170614.aspx

■ **Harris Williams & Co.**, a Richmond, Va., investment bank, announced the pending sale of Chicago-based marketing intelligence firm **Market Track LLC** to **Vista Equity Partners**, Austin, Texas.

Alliances/strategic partnerships

■ Mobile marketing services firm **3Cinteractive**, Boca Raton, Fla., has partnered with independent wine retailer **Total Wine & More**. 3Cinteractive will use its Switchblade platform to deliver digital coupons through e-mail that can be added to a customer's mobile wallet for in-store redemption, as well as create brand exposure on the customer's mobile device.

■ In the U.K., customer experience technology and services company **MaritzCX** has formed a partnership with mobile survey technology firm **OnePoint Global**. The partnership allows the integration of SMS as an additional feedback tool which is complementary to existing CX survey architecture.

■ In Norwalk, Conn., **Shopcom**, the advertising analytics and insights division of Kantar Worldpanel, and marketing solutions firm **Affinity Solutions** have formed a new partnership, giving brand marketers and agencies a way to conduct cross-screen media planning, targeting and closed-loop measurement. The integration of Affinity Solutions' Purchase-Driven Marketing Cloud allows Shopcom to use past individual-level purchase data to help brands and advertisers make future spend predictions and measure overall sales lift and revenue impact from in-store and online channels.

■ Reston, Va., firm **comScore** is working with **Google** to provide independent brand safety reporting of advertising campaigns on YouTube. The collaboration is part of Google's efforts to provide advertisers with greater visibility into the context in which their ads appear.

■ Fishkill, N.Y., incentive solutions provider **Virtual Incentives** has partnered with Stamford, Conn., research company **FocusVision** to provide rewards and incentives for the company's clients and users. Virtual Incentives' API is now fully integrated into Decipher, FocusVision's online survey solution, to boost respondent experience and engagement.

■ France-based research firm **Strategir** and China-based researcher **WisdomAsia** have reported that they have stopped their partnership as of March 31. William Lu, former co-managing director of WisdomAsia, has started a new company named BlueGate Research & Consulting and has set up Strategir BlueGate, a new joint venture with Strategir.

■ Newton, Mass., software company **MarketSight** has formed a strategic partnership with Westport, Conn., data and insights firm **Critical Mix**. The alliance will allow users to integrate MarketSight's data analysis platform with survey results created by CMIX, Critical Mix's tool for creating insights.

■ **Maritz Motivation Solutions**, St. Louis, has formed a partnership with receipt-capture provider **TPG Rewards Inc.**, adding to Maritz's customer loyalty solution by letting marketers build loyalty with customers at the point of sale through customers' mobile devices. The partnership will allow receipt capture technology to be used with long-term loyalty program strategies, where consumers can earn redeemable points for their ongoing purchases.

■ Auburn Hills, Mich., researcher **Gongos Inc.** and customer experience firm **Customerville**, Seattle, have formed a partnership to offer turnkey customer experience solutions. Customerville's customer feedback platform uses technology, human-centric design and behavioral science to emulate how people naturally share and respond to feedback. Gongos will further pinpoint customer pain, identify gaps between brand promise and experience and help organizations design activation plans to enhance customer lifetime value.

■ Marking Canada's 150th anniversary, **Passport 2017** – a news and events app and Web site created by St. Joseph Media's Strategic Content Labs and funded in part by the Government of Canada – is partnering with Toronto-based online data collection firm **AskingCanadians** to discover where Canadians want to go and what they want to see and do across Canada this year. Under the partnership, AskingCanadians will assist Passport 2017 with several research initiatives to gather feedback from Canadians.

■ In New York, Art Savitt, CEO of **WACS Insights & Strategy**, and Sharon Livingston, owner of **The Livingston Group for Emotional Marketing Inc.**, have formed a strategic alliance to better serve their respective research customers through combined quantitative and qualitative resources.

Awards/rankings

■ **The Advertising Research Foundation** (ARF), New York, announced the winners of The ARF David Ogilvy Awards. Some of the winners include: Grand Winner: "Take on TJ," Nike; Big Data Gold: "Make America Number One," Cambridge Analytica; Cross-Platform Gold: "Welcome to Johnsonville, Wisconsin," Johnsonville Sausage; Impact on the World Gold: "TV Doctors of America," Cigna; Mobile Gold: "Distant Memory," Advil; New Audiences Gold: "Climb On," Coors Light; Reinventing Traditional Media Gold: "Beautiful, Naturally Mobile Studio," Garnet Hill; Social Media Gold: "Take on TJ," Nike; and Transformation Gold: "Healthmetre," Turkcell. A full list of winners can be found on the ARF Web site.

■ **OSI Creative**, an Irvine, Calif., point-of-purchase display company, received silver Outstanding Merchandising Achievement awards from Shop!, a nonprofit trade association. The company's American Crew Guitar Case display won the award in the hair care and skin care permanent category and the Samsung Security Camera display was recognized in the club store permanent category.

New accounts/projects

■ In Paris, researcher **Bakamo Social** has partnered with journalist Pierre Haski for a study showing the reach and impact of unconventional media sources in connection with the 2017 French presidential election. The non-traditional sources are categorized in a Media Map, a classification model that reflects a source's distance from traditional media sources like newspapers, radio and television. Impact will be measured by the extent to which articles from non-traditional sources are shared through social media, in both absolute terms and in relation to articles shared from traditional sources.

■ London-based advertising agency System1 Agency has been appointed by **The ESOMAR Foundation**, ESOMAR's charity arm, to manage its global advertising account. The agency will create a global communications campaign for the foundation that will run later this year.

New companies/new divisions/relocations/expansions

■ Digital marketing agency **Omnicore** has opened a new office in Dubai, UAE, giving businesses, startups and entrepreneurs in the region access to digital marketing services and campaigns.

■ U.K. research firm **BrainJuicer** has rebranded as **System1 Group**, which is comprised of System1 Agency and System1 Research.

■ **Healthcare Research & Analytics** has relocated from Parsippany, N.J., to a new corporate headquarters in Cranbury, N.J. The move allows the firm to be in the same location as the other businesses of its parent company Michael J. Hennessy Associates Inc.

■ **451 Marketing**, Boston, will begin operating under a new name, **Agency 451**, accompanied by a new corporate identity and a new Web site. The company offers research and analytics, creative, strategy, advertising, digital marketing, public relations and social media.

■ Kansas City, Mo., marketing analytics firm **Alight Analytics** has launched **Insight Group**, a new division that will provide analytics consulting and training for brands and agencies. The company is also making available its professional training program, Marketing Analytics Academy.

■ In Chicago, communications agency **Leo Burnett** has launched **The Core**, an integrated data and analytics offering led by Chief Intelligence Officer John Lowell. The Core combines the firm's existing research and CRM specialties with the proprietary Ardent search technology that the agency acquired in January.

■ Watertown, Mass., marketing and public relations firm **Greenough Brand Storytellers** has launched **Brand Journalism Research**, a new research offering that helps clients develop their brand journalism programs. The offering includes concepting, research design, execution, analysis and recommendations for converting insights into brand journalism strategies across earned and paid media channels.

Research company earnings/ financial news

■ U.K. insight agency **Firefish** has reported a 15 percent increase in group revenue over the past year, from £10.1 million to £11.7 million. The firm's kids and family consultancy, The Pineapple Lounge, has reported an increase of 86 percent from the previous year, while Firefish's quantitative business, the numbers lab, reported a 27 percent rise in revenue. Firefish US reported a 40 percent increase in revenue from the previous year.

■ Research software company **Remesh**, New York, has closed a $2.25 million seed investment round, bringing its total funding to $3.85 million. The round was led by venture capital firm LionBird Ventures and also included holding company Reimagine Holdings Group as well as individual investors.

■ **MFour Mobile Research**, Irvine, Calif., has partnered with Kayne NewRoad Ventures Fund for $5 million in new investment that will be used to scale technology and research staff, with more than $2 million dedicated to marketing its MFourDIY survey platform. The remainder of the investment will be used to expand internationally and scale its staff by adding to its Labs & Engineering, Operations and Sales departments. Separately, MFour Mobile Research reported that it has received $680,000 in tax credits from California's state government under the California Competes job creation program. The credit is contingent on MFour adding at least 77 full-time staff positions in California over a five-year span from 2017 to 2021, but the company says it expects to surpass that target before 2021.

■ In Dallas, Hal Brierley, founder of **Epsilon**, **e-Rewards** (now Research Now), **Brierley+Partners** and **The Brierley Group**, has made a strategic investment in insights technology company **UBMobile** and joined its board of directors.

■ New Orleans-based audience platform **Lucid Holdings LLC** has reported a $60 million minority investment led by private equity firm **North Bridge Growth Equity**. The capital raised will be used to accelerate growth by advancing product development, design and to expand Lucid's team in the U.S. and internationally.

CALENDAR OF EVENTS

••• can't-miss activities

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.

The 2017 Pharma Market Research Conference (Bay Area) will be held on **June 13-14** in **San Francisco**. Visit bay-area.pharmamarketresearchconference.com.

Applied Marketing Science will hold a Journey Mapping Workshop on **June 14-15** at The Cornell Club in **New York**. Visit ams-insights.com/training-coaching/upcoming-workshops/journey-mapping-workshop.

LIMRA will hold its 2017 Big Data Analytics Conference on **June 19-21** at Loews Annapolis in **Annapolis, Md.** Visit www.limra.com/bigdataconf.

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.

AMA will hold its 2017 Advanced Research Techniques (ART) Forum on **June 25-28** at the Hyatt at Olive 8 in **Seattle**. Visit www.ama.org.

Unicom will hold a conference, 'Data Analytics and Behavioural Science Applied to Retail and Consumer Markets,' on **June 28** at the Millennium Hotel London Mayfair in **London**. Visit conferences.unicom.co.uk/data-analytics-2017.

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

Unicom will hold a conference, 'AI, Machine Learning and Sentiment Analysis Applied to Finance,' on **June 28-29** at Millennium Hotel London Mayfair in **London**. Visit conferences.unicom.co.uk/sentiment-analysis.

The 2017 Pharma CI Asia Conference and Exhibition will be held on **July 13-14** in **Singapore**. Visit asia.pharmaciconference.com.

Insight Exchange Network will hold an event, 'Sentiment, Emotional and Behavioral Analytics to Boost Brand and Customer Insights,' on **July 17-18** at Marines' Memorial Club in **San Francisco**. Visit www.insightxnetwork.com/sentiment-emotional-behavioral-analytics.html.

Semiofest 2017 will be held on **July 19-22** at the Gladstone Hotel in **Toronto**. Visit 2017.semiofest.com.

AMA will hold its 2017 Summer Conference on **August 4-6** at the San Francisco Marriott Marquis in **San Francisco**. Visit www.ama.org.

AMSRS will hold its 2017 National Conference on **September 7-8** in **Sydney**. Visit www.amsrs.com.au/conference-information.

ESOMAR will hold its 2017 Congress on **September 10-13** in **Amsterdam**. Visit www.esomar.org.

AMA will hold its 2017 Annual Conference on **September 11-13** at Caesars Palace in **Las Vegas**. Visit www.ama.org.

The Strategy Institute will hold its Fourth Annual Digital Customer Experience Strategies Summit on **September 19-20** at the Fairmont Chicago, Millennium Park in **Chicago**. Visit www.digitalcustomerexp.com.

The Strategy Institute will hold its Digital Marketing for Financial Services Summit Europe event on **September 21-22** at The Tower Hotel in **London**. Visit www.digitalfinancialmarketing.com.

The Insights Association will hold its 2017 Insights Leadership Conference on **September 26-28** in **Palm Beach, Fla.** Visit www.insightsassociation.org/conference/2017-insights-leadership-conference.

The 2017 PMRG Institute will be held on **October 2-4** in **New Brunswick, N.J.** Visit www.pmrg.org.

NMSBA will hold its Shopper Brain Conference - Europe event on **October 5-6** at Hotel Casa400 in **Amsterdam**. Visit www.shopperbrainconference.com/amsterdam.

The Insights Association will hold the 2017 Corporate Researchers Conference (CRC) on **October 16-18** in **Chicago**. Visit www.insightsassociation.org/conference/2017-corporate-researchers-conference-crc.

LIMRA will hold its 2017 Annual Conference on **October 22-24** at the Gaylord National Resort and Convention Center in **National Harbor, Md.** Visit www.limra.com/annual.

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

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10 minutes with...

Kara Sterner
Director of Innovation, Bumble Bee Foods

"Marketing research gets a bad rap for being both costly and lengthy but with some of the newer agile tools, this is changing."

Describe your journey to becoming the director of innovation at Bumble Bee Foods.

A learning journey is the perfect way to describe how I got to where I am today. It really all started with an interest in understanding how we as consumers make decisions to buy stuff. I have deep roots in the principles and practices of marketing, doing everything from introducing interior designers/magazine publishers to luxury textile lines, designing RFPs to win multimillion-dollar architecture jobs, bringing new technologies to life for retailers or building new brands and product lines from white-space opportunities. The common thread across these accomplishments is the use of insights and data to define the challenge and ultimately solve the problem.

How have you leveraged agile research in the past?

What I love about many of the new agile marketing research solutions becoming available and reputable is the speed at which we as a business can capture insights and integrate them into our processes. Marketing research gets a bad rap for being both costly and lengthy but with some of the newer agile tools, this is changing. For example, at Bumble Bee we have been able to iterate new product concepts multiple times through agile research – quant and qual – during the first two phases of our Stage-Gate process in a matter of weeks vs. months, which in the big picture has saved us time and money. In addition, agile research has enabled our organization to prioritize and focus on the ideas that resonate most with a targeted consumer through the use of quant concept testing that brings results within seven days. That is lightning-fast!

What tips can you offer to researchers looking to gain buy-in from the C-suite to leverage a new type of research?

C-suite buy-in is absolutely imperative if you want to grow the use of insights throughout the organization and continue to be funded. Two of the biggest challenges I have faced – not just at Bumble Bee – are when the C-suite does not understand how to use the data and when they are not seeing things move quickly enough. As insight-centric professionals, it is our job to help the C-suite by bringing actionable insights to the table – not just a bunch of data – as well as to use the best research method that will uncover an insight within an acceptable timeline. At Bumble Bee, the monthly/quarterly meeting cadence we have with our Innovation Steering Committee is valuable time where we established a consistent way to look at insights that help inform the go/no-go decisions. For example, when sharing concept scores, we show them in the context of everything we tested against as well as competitors in the category. This helps keep the group grounded. With regards to speedy research, we have addressed this by providing a recommended approach but also including two other routes we could take the project, outlining what we gain or lose as the process changes.

Read the full interview at quirks.com/articles/2017/20170622.aspx.