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For marketing research and insights professionals

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PLUS A new approach to key driver analysis for CX research

The role of the journey map

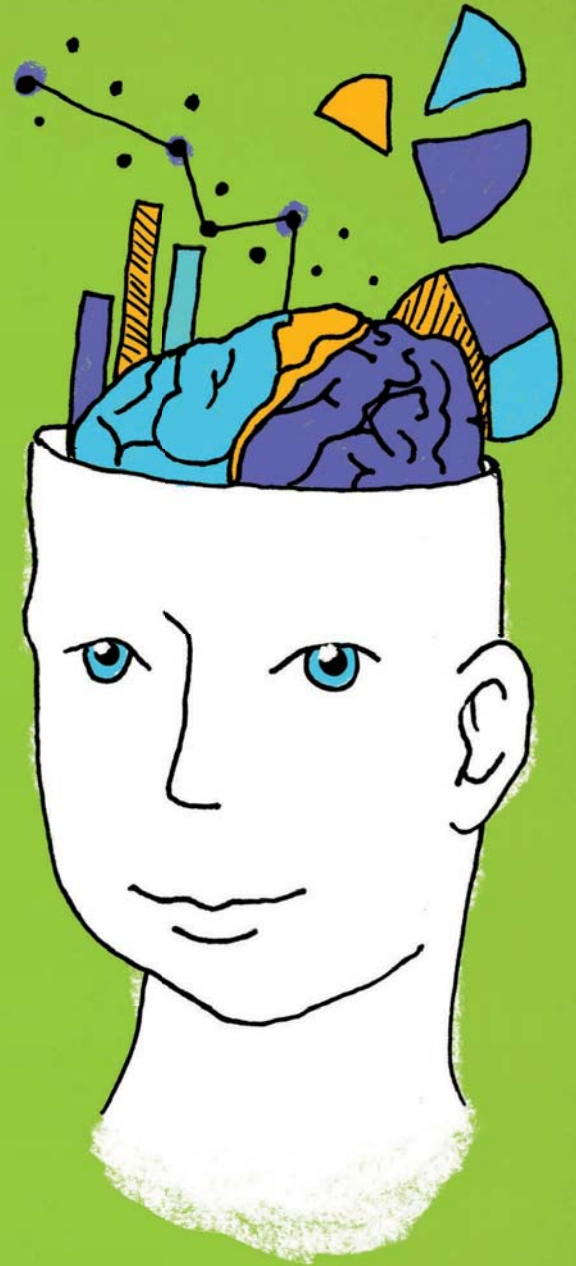Identifying complex treatment patterns through multi-line treatment simulation

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ON THE COVER

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COLUMNS

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The dashboard captures viewability and other metrics

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••• online, e-newsletter and blog highlights

Q // Noted Posts

••• online tool

Salary survey crosstabs available

Every year for the past nine years, Quirk's has conducted a salary survey of researchers so that our readers can get a snapshot of the compensation landscape and how it's changing. But did you know that the salary survey data is available online, searchable by client- or provider-side job title?

With more than 40 job titles to choose from, you can review a complete breakdown of compensation by age, gender, location and more. Don't miss the opportunity to see how your compensation compares to the rest of the industry. Visit www.quirks.com/tools/salary-survey to get started.

••• events

Say hello to Quirk's at fall shows

Fall is a busy time for marketing research conference-going. Quirk's will be attending several conferences before the end of 2017, including TMRE in Orlando, Fla., October 22-25, and Research & Results in Munich, October 25-26. If you are attending either show be sure to stop by the Quirk's booth to say hello. We're always looking to make one-on-one connections with our readers! And be on the lookout for free Quirk's materials at these and other fall shows.

Starting to plan your event calendar for 2018? Check out The Quirk's Events – held in Orange County, Calif., and Brooklyn, N.Y. – at TheQuirksEvent.com as well as quirks.com/events for a list of all the marketing research-related happenings, including event descriptions, discount codes, estimated attendance numbers and more.

Q // E-newsworthy

Mining the patient ecosystem to achieve better patient outcomes
quirks.com/articles/2017/20170826-2.aspx

How do your customers define a quality customer experience?
quirks.com/articles/2017/20170825-1.aspx

Disrupting the experience: Study identifies best practices for video ad delivery
quirks.com/articles/2017/20170826-1.aspx

QuirksBlog.com

My husband's leery of phone surveys
https://goo.gl/fTxRoM

Study looks at hiring environment for creative professionals
https://goo.gl/xAutqj

Best in show at the 2017 Quirk's Events
https://goo.gl/ayfLwU

ResearchIndustryVoices.com

Netflix without Disney? Study looks at subscriber reactions
https://goo.gl/CNXciM

Stop draining customer empathy out of your organization
https://goo.gl/HmEdwo

Study looks at how brands can appeal to pet owners
https://goo.gl/CRn1ch

ResearchCareersBlog.com

Making the best of 7 workplace moments that suck
https://goo.gl/fCs5nQ

Multiple generations in the workplace? 4 tips to improve decision-making
https://goo.gl/nRspxk

5 tips for women seeking greater influence in 2017
https://goo.gl/C6sVGz

••• retailing research

Retailers, behold the power of touch

As online retailers continue to draw sales from brick-and-mortar stores, how can the physical locations compete? It could be as simple as reminding consumers that they can touch the merchandise, says Michigan Ross Professor Rajeev Batra.

And reaching out to consumers with the right mind-set is equally important, according to Batra and colleagues in a new study examining the effect of product touch on consumers' willingness to buy.

"In this context, it is important to identify what strategies offline retailers can utilize to fight back," says Batra, professor of marketing. "As online and offline retailers differ in their inherent ability to offer consumers the opportunity to physically touch a product prior to purchase, we studied the thought processes of consumers who rely more on pre-purchase touch to make purchase decisions – thus becoming more susceptible to marketing efforts from offline retailers."

Study participants were evaluated considering the purchase of a mug, a computer mouse and a pen in three separate experiments. Researchers found that when consumers' mental representation of products is relatively concrete, they rely on the availability of product touch to determine if they want to buy the product being evaluated.

Concrete thinkers increase their desire to purchase after touching the target product. For those who think of products in the abstract, their desire to buy a product is unaffected by touch entirely. "These results show for the first time that consumers' cognitive styles affect their decision-making in the online and offline retailing environments," Batra says.

Batra's co-authors were Wumei Liu of Lanzhou University in China and Haizhong Wang of Sun Yat-Sen University in China. The study – "Product touch and consumers' online and offline buying: The role of mental representation" – appeared in the *Journal of Retailing*.

••• automotive research

Auto shows rival digital marketing in car-buyer influence

A study by Michigan-based Foresight Research reveals that auto shows are actually as effective as digital marketing in influencing buyers' purchase decisions among buyers engaged with each activity.

Based on surveys with 5,500 recent U.S. new car and truck buyers, Foresight's 2017 Auto Show Immersion Report found three times as many buyers had read digital auto content prior to their purchase as attended an auto show in the same period. But comparing those two groups, auto show attendees were just as often influenced by their show experience as digital users were by the digital content they consumed.

The study confirms that auto shows provide a highly desirable audience for marketers. Buyers attending auto shows: are younger and 25 percent more often first-time new vehicle buyers; are more often luxury brand buyers; are far more car-connected – using multiple automotive communications and participating heavily in experiential marketing; are an invaluable source of downstream word of mouth – advising twice as many other people about new cars and trucks they should consider, recommending their purchased brand twice as often and posting or blogging 75 percent more often online about their new vehicle.

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YOUR CLEAR CHOICE
For Skilled Industry B-to-B Sample

my clear opinion **PANEL**

Deloitte study offers help with researching your end users

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Joe Rydholm can be reached at joe@quirks.com

In analyzing and writing about the data from our annual survey of corporate researchers for our Q Report (aka The Corporate Researcher Report, which was mailed with your copy of the Researcher SourceBook last month), I was again reminded of how difficult the job of an insights professional can be.

Based on some of the comments to our various open-ended questions on aspects of life as an insights pro, it sounds like it's an ongoing struggle to gauge the mental state of the people, often executives, to whom you deliver your findings. Are they the type who can't stand to hear bad news? (Messenger, prepare to be shot!) Does their fragile ego need to be preserved? (Get ready to sugarcoat like you went to confectionery school!) Do they have the attention span of a gnat? (Even a one-page topline has one page too many for this person!)

No matter what your role as an information-deliverer is – whether you're part therapist, part court jester, part truth-teller or some combination of all three on a daily basis – it's helpful to understand the psychology of the executives who are the end users of your data. One way to do that is by classifying and describing them, which was the focus of a report earlier this year from consulting firm Deloitte.

Deloitte has identified four primary "Business Chemistry" types: Pioneers, Drivers, Guardians and Integrators. Pioneers value possibilities and spark creativity. Drivers value challenge and generate momentum. Guardians value stability and bring order and rigor. And Integrators value connection and draw teams together.

For a report titled Business Chemistry in the C-suite, researchers from the Deloitte Greenhouse Experience team surveyed 661 C-suite executives and found that two of those four types accounted for nearly two-thirds of the sample: Pioneers – 36 percent; Drivers – 29 percent; Guardians – 18 percent; Integrators – 17 percent.

While each person is potentially a mix of all four categories, based on the above it seems a bit more likely you'll be dealing with a Pioneer or a Driver, though Deloitte found that factors such as job function (CIO, CFO, etc.), organization size, industry and gender contributed to the differences in the proportion of Business Chemistry types in the C-suite. For example, as outlined in the report, while Pioneers were more prevalent in the C-suite overall, Drivers (37 percent) and Guardians (26 percent) were the two top CFO types represented, while the CIO role contained relatively similar proportions of Drivers (37 percent) and Pioneers (36 percent). Similarly, in the largest organizations in the sample, those with more than 100,000 employees, the proportion of C-suite executives who

were Drivers (38 percent) outpaced the proportion of Pioneers (29 percent).

Compared to Pioneers, Drivers tend to be less comfortable using intuition and have a stronger need to verify information and to know the right answer. They also see things in more black-and-white terms than Pioneers do. Guardians are similar to Drivers in these ways, and while Integrators look a little more like Pioneers in regard to these traits, they're not quite as strong as Pioneers on any of them.

Mentally plot

The report is available for download at http://bit.ly/2gYnzrm. It has a helpful infographic upon which you can mentally plot the execs you work with to better understand how they think. This stuff isn't groundbreaking – Pioneers (surprise!) tend to be detail-averse risk seekers, for example – but it's useful to have a rubric like Deloitte's to give some shape to the landscape before you.

After all, when you're in the business of presenting research results, it never hurts to do a little research of your own on the people who will have to make decisions based on your work. Q
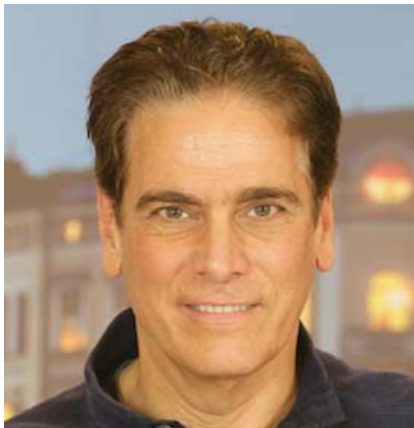
ASK THE EXPERT

Expert answers to important research questions.

What can online dashboard reporting give me beyond great visualization?

Rudy Nadilo
President, Dapresy North America Inc.
info@dapresy.com
603-766-1925

I recently visited one of our clients who is using our platform for many of their tracking programs. They shared a problem they were having and wanted to know if we could offer a solution. This client in particular was working with a large restaurant chain with thousands of locations. Ideally, they wanted their regional manager to be able to log in to one location to view data based on region, district and unit. However, without extensive hierarchical user management, that regional manager had to have three separate logins to view region, district and unit data. Obviously, this takes more time and is not acceptable in this fast-paced data-driven world!

Dashboard reporting software is perfect for delivering customer experience feedback. It is by far more

> Delivering the best customer experience requires understanding the customer journey and staying on top of their feedback.

efficient and effective than PowerPoint or custom portal alternatives. I'd also recommend looking at combining this with a comprehensive feedback and action management module which allows you the ability to quickly take action to resolve any customer problems that occur.

Delivering the best customer experience requires understanding the customer journey and staying on top of their feedback. Reporting software delivers the right information to the right people at the right time.

Kristen Miles
Director of Insights, Branded Research Inc.
kristen@gobranded.com
888-848-2525

Are survey panelists recruited from social media reliable and representative?

Social media has broad appeal with near universal usage, making social networks the ultimate consumer and business market research database. Use of social media has grown by 1,280 percent since 2005, with roughly 178 million U.S. adults using social media today. About 7-in-10 U.S. adults have a Facebook profile, while LinkedIn usage is a must for the vast majority of professionals. Branded Research leverages Facebook and LinkedIn for a majority of our panel, providing us with high-quality, socially-validated sample and unique psychographic and demographic targeting abilities.

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/2017/20171055.aspx.

IN FOCUS

Q // Survey Monitor

••• shopper insights

Nielsen data finds grocery growth pockets

More trips, more opportunities

Despite overall bleak headlines about retail's slowdown in the last year, there are still some pockets of growth happening across the U.S. grocery retail landscape, according to findings from Nielsen studies. To understand where these pockets exist, retailers must first understand the dynamics of consumers' shifting shopping habits in recent years across channels.

For the first time in over a decade, shoppers actually made more trips to stores, taking an average of 109 trips per household in 2016. However, despite this increase in trips, overall spending was flat, as 85 percent of those additional trips had smaller basket sizes (less than 15 items per trip) compared to the year prior. More frequent trips with smaller basket sizes leads to less worth in dollar sales for retailers.

One channel worth focusing on is deep discounters that offer value and heavy discounts (not including dollar stores). For many retailers, but particularly deep-discount retailers, store brands (also referred to as private label) play a strategic role for winning over shoppers from other channels. Compared to other major retail channels, deep discounters have more than twice the store-brand share of dollars.

While consumers are taking more trips across most retail channels, deep-discount grocery is seeing some of the largest increases in shopper activity. In fact, while trips across all channels are up 0.5 percent, shoppers took 2.8 percent more trips to deep discounters over the last year. However, only about 40 percent of households shop at deep discounters, which is much lower compared to more established channels like supermarkets and mass merchandisers. For deep discounters, there are still significant opportunities for growth ahead, unlike the already-saturated conventional grocery channel.

What's more, deep-discount grocery and online channels were among the top-growing beneficiaries of consumer spend leakage from mass merchandisers. With online grocery sales anticipated to reach $100 billion by 2025, e-commerce will continue to siphon off sales from other channels. Part of the reason consumers are going online is because they're seeing value, spending more per trip on store-brand purchases made online ($17 average) compared to the total average basket spend on store brands across all channels ($12 average).

When it comes to deep-discount grocery chains, store brands comprise a majority share of sales in three departments: dairy (72 percent), grocery (52 percent) and frozen food (53 percent). This is driven by both penetration and trips, with consumers making more trips to purchase store-brand grocery, dairy and frozen products (up 3.3 percent, 5.7 percent and 3.7 percent in trips, respectively, compared to the prior year) than trips made for branded products from these departments.

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Deep-discount grocery retailers are certainly reaping the benefits of having a robust store-brand presence within their stores. With consumers taking three times more trips including store-brand purchases to deep-discount grocery stores compared to other channels, like mass merchandise or dollar stores, opportunity for growth should only continue to rise.

While deep discounters have significantly high store-brand growth, there is still room for penetration growth across all retail channels. Whether a deep discounter, a traditional supermarket or an online channel, retailers should continue to keep store-brand strategy front and center as a way to offer consumers the value and quality they're looking for at price points that resonate with their wallets.

Insights from this article were derived from: Nielsen Homescan, Total U.S., 52 weeks ended April 29, 2017 (UPC-coded items); Nielsen Answers Panel, 12 weeks ended Jan. 28, 2017.

●●● automotive research

AAA studies cost of car ownership

$8,500 for average new vehicle

Owning and operating a new vehicle in 2017 will cost a driver an average of $8,469 annually, or $706 each month, according to a new study from AAA. The annual evaluation of

Vehicle Type	Annual Cost*	Vehicle Type	Annual Cost*
Small Sedan	$6,354	Minivan	$9,146
Small SUV	$7,606	Large Sedan	$9,399
Hybrid	$7,687	Medium SUV	$9,451
Medium Sedan	$8,171	Pickup Truck	$10,054
Electric Vehicle	$8,439	Average	$8,469

* Based on 15,000 miles driven annually

driving costs reveals that small sedans are the least-expensive vehicles to drive at $6,354 annually, however small SUVs ($7,606), hybrids ($7,687) and electric vehicles ($8,439) all offer lower-than-average driving costs to U.S. drivers. Conversely, of the nine categories included in the evaluation, pickup trucks are the most expensive vehicles to drive at $10,054 annually.

In addition to analyzing the ownership costs for sedans, SUVs and minivans, AAA's Your Driving Costs study added four new vehicle segments in 2017 – small SUVs, pickup trucks, hybrids and electric vehicles.

To estimate the overall cost to own and operate a new vehicle, AAA evaluated 45 2017 model-year vehicles across nine categories and focused on mid-range, top-selling vehicles. AAA's annual driving cost is based on a sales-weighted average of the individual costs for all of the vehicle types. Key findings include:

Depreciation – the declining value of a vehicle over time – is the biggest, and most often overlooked, expense associated with purchasing a new car. New vehicles lose an average of $15,000 in value during the first five years of ownership. In 2017, small sedans ($2,114) and small SUVs ($2,840) have the lowest annual depreciation costs, while minivans ($3,839) and electric vehicles ($5,704) are at the high end of the scale.

To calculate annual maintenance and repair costs, AAA examined factory-recommended maintenance, replacement tires, extended warranty costs and services associated with typical wear and tear. New vehicles, on average, will cost a driver $1,186 per year to maintain and repair.

The inevitable costs associated with maintenance and repair should be an important consideration for car shoppers, as a recent AAA survey found that one-third of U.S. drivers could not afford an unexpected repair bill.

Fuel costs vary significantly by vehicle type, ranging from 3.68 cents per mile (electric vehicles) to 13.88 cents per mile (pickup trucks). New vehicle owners, on average, will spend just over 10 cents per mile – about $1,500 annually – to fuel their vehicles.

New to the Your Driving Costs study in 2017, AAA found that electric vehicles have lower-than-average driving costs at $8,439 per year. Without a gasoline engine to maintain, electric vehicles have the lowest annual maintenance and repair costs, at $982 per year. By relying on electricity instead of gasoline, fuel costs are also significantly lower than average, at under 4 cents per mile. Depreciation, however, is currently extremely high for these vehicles, losing an average of nearly $6,000 in value every year. A recent AAA survey revealed that one in six Americans is likely to choose an electric vehicle, the majority motivated by their lower long-term ownership costs.

••• media research

Podcast audience small but influential

Nearly one in 10 U.S. adults downloaded or listened to a podcast in the last 30 days – a young, well-educated and highly successful audience that relies on both digital and traditional media, according to researcher GfK MRI.

Compared to the general U.S. population (ages 18+), recent podcast users are engaged with their phones as sources of entertainment. They also rank high when it comes to their ability to influence other people, according to the most recent data (September 2016 to May 2017) from GfK MRI's Survey of the American Consumer.

Approximately 8.6 percent of U.S. adults – roughly 21 million people – downloaded or listened to a podcast in the last 30 days, up from 7 percent a year ago. Among podcast users, 53 percent were college graduates, 45 percent held managerial/professional jobs and 45 percent were between the ages of 18 and 34 – proportions well above the general population figures.

While the podcast group is very active on the Internet, they are also big readers of print magazines, with 22 percent placing in the heaviest reading quintile (slightly higher than the U.S. average). Some 68 percent had visited a magazine Web site – and 69 percent a newspaper Web site or the electronic version of a newspaper – in the last 30 days.

Seven in ten (70 percent) podcast users consider their mobile phones as sources of entertainment and about 36 percent would be willing to receive ads on their phones in exchange for lower monthly costs. In addition, 68 percent are interested in watching video clips on their mobile phones and 21 percent say they would be willing to pay a monthly fee to watch live TV on them. (Note: Data in this paragraph come from the Fall 2016 GfK MRI release, covering September 2015 to November 2016.)

News Web sites are popular destinations for podcast users – including nytimes.com (visited by 32 percent of users), huffingtonpost.com (32 percent), wsj.com (22 percent) and bbc.com (20 percent). GfK MRI also found that 20 percent of podcast users are "Influentials," meaning that they engaged in three or more of 11 public activities, from making a speech to running for political office. This is three times the incidence of Influentials in the total adult population (7 percent).

GfK MRI's data shows that more than one in 10 (11 percent) podcast users is an active member of a group that tries to influence public policy or government; that is triple the proportion (3.7 percent) in the general population. Eighteen percent (18 percent) say they have attended a political rally, speech or protest – making them 163 percent more likely than all adults (7 percent); and 24 percent have contacted a politician at the state, local or national level, versus 10 percent among all respondents.

••• financial services

Keeping up with the digital natives

Highlights from BOA's consumer mobility report

Digital natives' obsession with technology is set to change the world as we know it. A recent survey finds they are so concerned with their digital footprint, the majority (54 percent) of Millennials and Generation Z (ages 13-17) are Googling themselves regularly, with 10 percent self-searching on a daily basis.

Furthermore, Gen Zers would give up daily "must-haves" to remain connected to their mobile device for the day, including television (80 percent), tablets (78 percent) and gaming systems (64 percent). Nearly one-third would even give up their friends or money (28 percent).

These findings are from the latest Bank of America Trends in Consumer Mobility Report, which explores timely mobile trends and forward-looking consumer behaviors that increasingly impact our everyday lives. For the first time, the survey includes today's youngest generation – Generation Z – to better understand the future of mobile and the next era of banking.

One of the most visible differences today is the way we communicate, as Gen Zers appear to live by the mantra, "If you can't say it in 140 characters or less, don't say it at all." According to the survey, Generation Z is significantly more likely than their older counterparts to use emojis (95 percent, compared to 79 percent), social media (88 percent, compared to 77 percent), acronyms (87 percent, compared to 69 percent) and even selfies (81 percent, compared to 45 percent) to converse with others.

These changing communications and social norms also appear to influence the way parents interact with these digital natives. While 48 percent of parents say mobile has a positive impact on their family life, many parents are instituting digital boundaries in the household, with a ban on texting and driving (66 percent), mobile phones

at the dinner table (52 percent), and e-mailing or texting during a conversation (43 percent) as the most popular.

What's more, almost all parents say they keep an eye on their children's technology use, with nearly half monitoring everything and keeping tabs on their passcodes, and only 5 percent completely respecting their privacy.

While younger generations are also leading the charge as it relates to mobile finances, with three-quarters of Millennials using a mobile banking app, adoption is strong across all generations. Two-thirds of Gen Xers use the app, followed by 47 percent of Baby Boomers and 40 percent of seniors.

Millennials are the most likely generation to turn to the app during key life events, including saving for college (45 percent, compared to 29 percent), planning for retirement (35 percent, compared to 28 percent) and

buying a home (34 percent, compared to 24 percent).

Overall, 62 percent of Americans use their bank's mobile app, up from 54 percent in 2016. Of users, more than four in five access their mobile banking app at least once a week, with 29 percent checking their app daily.

Other highlights from the report include:

Reconnecting with retro: 76 percent of consumers say they use a retro device, including CDs (49 percent), landlines (36 percent) and VCRs (17 percent).

Digital detox: 46 percent of adults are supportive of digital detoxes – intentionally disconnecting for more than 24 hours – with 11 percent reporting they've previously done one.

Age of information: Americans are increasingly turning to mobile as their go-to news source, with many learning about the following prominent events through digital channels.

Sharing it all: Many consumers want their mobile device to track their daily activity, with Millennials the most comfortable storing their personal (93 percent, compared to 82 percent) and financial (84 percent, compared to 63 percent) information.

Convergys, an independent marketing research company, conducted a nationally representative online survey on behalf of Bank of America May 25-June 3, 2017 using a panel-provided sample. Convergys surveyed 1,000 respondents throughout the U.S., comprised of adults ages 18+ with a current banking relationship (checking or savings), and who own a smartphone. In addition, 201 panelists were surveyed in the 13-to-17-year-old age group who also own a smartphone. The margin of error for the national sample of n=1,000 is +/- 3.1 percent, and the margin of error for the 13-to-17-year-old sample where n=201 is +/- 6.9 percent, with each reported at a 95 percent confidence level.

Product and Service Update

••• mobile research
Fuel Cycle adds geolocation to app

Ask questions, capture impressions

Research and community intelligence platform Fuel Cycle, Los Angeles, has added new geolocation capabilities for its mobile app, allowing businesses to use location-based research to capture location-specific customer intelligence. Brands can use the geotargeting feature to ask questions relevant to a location and capture the user's impressions in-the-moment through photos, videos, surveys and more.
www.fuelcycle.com

••• shopper insights
Companies team for VR shopping tools

Azure Knowledge, Advanced Simulations partner

Kennesaw, Ga., virtual reality research provider Advanced Simulations, in partnership with

research company Azure Knowledge, has introduced new virtual reality research products: 4D Shopper Plus uses Azure Knowledge's DigiWalks technology to put shoppers in an immersive environment based on photographs of actual stores, while 4D Shopper VR turns the immersive environments into virtual reality, allowing shoppers to walk through stores and pick up and interact with products. 4D Shopper is used to test the in-store and on-shelf impact of packaging, pricing, promotions, shelf assortment and shelf layouts.
www.advancedsimulations.com
www.azureknowledge.com

••• research communities
Toluna adds DIY community product

Build, create, recruit

Researcher Toluna, Wilton, Conn., has launched QuickCommunities, an addition to its digital insights platform QuickSurveys. QuickCommunities is a DIY product that allows users to build, create and recruit target consumers into a custom community experience for discussions, events and/or focus groups. A Web-based community portal is created using Toluna's wizard that provides customization options to ensure compliance with a company's brand guidelines. Businesses can target community members directly from Toluna's global consumer panel, selecting from more than 200 demographic and behavioral profiles, and then launch the community and invite members.
corporate.toluna.com

••• behavioral economics
CMI solution reflects consumer purchase choices

Multi-staged exercise

Atlanta research firm CMI has expanded its behavioral economics solutions suite with the addition of yChoose, a multi-staged exercise that simulates real-world behavior designed to reflect the several choices a consumer makes during a given purchase decision. YChoose identifies the influencers within a consumer's habitual decision-making loop, providing marketers with targeted strategies to increase brand choice over the competition. It is the third product to be added in the firm's behavioral economics-based solutions suite, followed by yPrescribe and yQuote.
www.cmiresearch.com

••• research communities
Harris Interactive UK launches PopUP Communities

Qual and quant

Harris Interactive UK, London, has launched PopUP Communities, a research solution that enables clients to run qualitative and quantitative research more quickly than traditional methods. The solution allows target audiences to be recruited and participating within hours, with projects adapting as they progress. PopUps can support initiatives like product or concept de-

velopment, usage and attitude studies and communications development. harris-interactive.co.uk

••• virtual reality
Isobar, MIT Media Lab VR collab

Focus on emotional response

Digital agency Isobar, New York, in collaboration with the MIT Media Lab, has developed a virtual reality emotional measurement and analytics platform that captures and analyzes behavioral data in virtual reality. The platform will be integrated with Isobar's MindSight tool to further understand the emotional response to content delivered in virtual, aug-

mented and mixed reality experiences. Isobar also integrated its platform with iMotion's biometric research platform, which measures human emotional response to visual stimuli. www.isobar.com

••• Briefly

■ Nonprofit organization Women in Research, Los Angeles, has launched its WIRexec program, an invitation-only membership program for corporate senior research executives and supplier/agency side executives and entrepreneurs. www.womeninresearch.org

■ Reston, Va., firm comScore has made upgrades to its MMX Multi-Platform and Mobile Metrix in Malaysia with the introduction of mobile consumer panel data, expanding its measurement of mobile audiences in Malaysia and allowing for better reporting of visitation,

engagement and demographics, including new segments for age and gender. MMX Multi-Platform and Mobile Metrix combine data from desktop and mobile consumer panels with data from the comScore census network, providing persons-based measurement of total digital reach. comscore.com

■ Thomson Reuters has launched Thomson Reuters Labs – The Incubator, a Switzerland-based start-up incubator that will host early-stage entrepreneurs building products in big data, advanced analytics, distributed ledgers, artificial intelligence, machine learning and other transformational technologies. www.thomsonreuters.com

■ Kantar Media, New York, has expanded its cross-platform ad intelligence capabilities by making available programmatic advertising data, providing more detailed insight

into digital ad buying channels. The data includes digital ads monitored on display, mobile and online video platforms.
www.kantarmedia.com

■ Kantar, London, has launched Kantar Activate, a new service that integrates consumer insights and behavior from across the Kantar portfolio with behavioral shopper and media data, allowing clients to leverage the studies they run with Kantar for targeting purposes.
www.kantar.com

■ San Mateo, Calif., firm SurveyMonkey has launched its People Powered Data platform, which helps businesses turn voices and opinions into data. As part of the new platform, the firm has also introduced SurveyMonkey CX, SurveyMonkey Engage and SurveyMonkey Audience, a suite of targeted products that provide customer, employee and market-powered data.
www.surveymonkey.com

■ Chicago-based researcher IRI has introduced a new premium service that provides point-of-sale market measurement data to its U.S. clients in five days, compared to the industry standard time frame of eight to nine days.
www.iriworldwide.com

■ Mobile marketing services firm 3Cinteractive, Boca Raton, Fla., has released its Chatbot Consumer Report, showing how consumers interact with chat bots and their preferences on using the technology when communicating with brands.
www.3cinteractive.com

■ U.K. video insight platform Voxpopme has released new sentiment analytics for video, powered by IBM Watson, which uses machine learning and natural language processing to identify underlying sentiment. This is used to process the transcribed text of videos in the

Voxpopme platform, returning a polarity on every sentence of each video and determining whether it is positive, negative or neutral with an associated score.
voxpopme.com

■ Campbell, Calif., customer engagement solutions firm [24]7 has introduced [24]7 Customer Journey Analytics, a solution that analyzes and visualizes customer journeys that occur over time, extend across channels and devices and span different IT systems, providing insight into the causes of problems along a customer journey.
www.247-inc.com

■ Reston, Va., firm comScore has introduced MyMetrix Explore, a data exploration and visualization platform that allows clients to create customized analyses, reports and visualizations.
comscore.com

■ Boston-based market intelligence firm InCrowd has launched its Global MicroTracker, an automated market monitoring solution for life science and pharmaceutical brands in competitive global markets.
www.incrowdnow.com

■ London-based research consultancy Acacia Avenue has launched its automated names test on ZappiStore's online platform. The firm's Namer solution uses behavioral economics thinking to help brands access consumers' instinctive response to their names. The solution is currently live in the U.K., U.S. and Canada and will be launching in eight other markets by the end of 2017.
www.acacia-avenue.com
www.zappistore.com

■ Boston-based consumer insights firm Crimson Hexagon has released its proprietary image analysis capabilities to help brands and agencies gain insights from photo data. Brands can apply Crimson Hexagon's analytics

engine to images to recognize scenes, objects, actions, faces and logos to learn who, how and where consumers engage with their products.
www.crimsonhexagon.com

■ Mobile marketing engagement firm Swrve, San Francisco, has made available its Premium Analytics offering, an add-on to its existing Swrve Mobile Engagement Platform that provides organizations with insights, reporting and analytics capabilities in relation to customers' mobile usage.
www.swrve.com

■ Kantar Media, London, has enhanced the capabilities of its Kantar Twitter TV Ratings tool with the integration of Facebook data, allowing clients to see counts of Facebook posts, likes, comments and shares pertaining to TV programs. The Kantar Twitter TV Ratings tool will be renamed as Social TV Ratings.
www.kantarmedia.com

■ Canada-based voice of the customer solutions firm iPerceptions has released AI Text Analytics, which uses natural language processing and machine learning technology to evaluate open-ended feedback and organize comments by praise, problem, suggestion or brand mention.
iperceptions.com

■ Maritz Motivation Solutions, St. Louis, has launched the Engagement Potential Index, an assessment for executives and HR practitioners to measure their company's current culture and engagement potential against industry benchmarks.
maritzmotivation.com

■ Netherlands-based research firm Nebu has launched its corporate social responsibility program by supporting 100WEEKS, an organization that focuses on helping women in developing countries to get out of poverty. 100WEEKS rolled out its program in Rwanda in 2015 and will

expand into Ghana by the end of 2017. It will provide 100 weeks of financial support and financial coaching to 100 women in cocoa-producing communities. Nebu will support the organization by providing survey and research tools to measure the impact the money has on the women's lives. www.nebu.com

■ U.K. mobile survey solutions firm OnePoint Global has introduced the next generation of its mobile survey platform's user interface. The enhanced capability allows researchers to deliver surveys onto any device, as well as create and launch their mobile research projects from any mobile device. www.onepointglobal.com

■ Shelton, Conn., researcher SSI and Alaska Airlines have introduced a new loyalty rewards program, The Opinion Terminal. The program enables Mileage Plan members to earn award miles by participating in surveys and will provide SSI customers with more access to consumer and business travelers' opinions. www.surveysampling.com

■ Research Rockstar, Southborough, Mass., has announced a 10-episode series, "Conversations for Research Rockstars," available on YouTube and as a podcast on iTunes. The series will be hosted by company President Kathryn Korostoff. www.researchrockstar.com

■ Warren, N.J., researcher Lightspeed has launched the Gravity Network, a partnership arrangement between data providers and platform companies to support the demand for sample for insights projects. This includes companies in the research and panel space as well as more technical platforms in media, data and CRM. www.lightspeedresearch.com

■ Waltham, Mass., speech and customer engagement analytics firm CallMiner has expanded its multi-language and data protection capabilities by making its platforms available in nearly 30 different languages and dialects. Multiple languages are also certified with full PCI-compliant redaction that removes sensitive information like addresses and ID numbers. callminer.com

■ Customer insights platform UserTesting, Mountain View, Calif., has launched Live Conversation, a solution that allows product teams, marketers, UX and CX professionals to more effectively conduct live interviews with customers. www.usertesting.com

A new approach to key driver analysis for CX research

| By Michael S. Garver, Richard Divine and Dominic Nieto

snapshot

The authors put forth a process and demonstrate the value of employing latent class regression and correlated components regression together for conducting key driver analysis with CX data.

Leading organizations use customer experience (CX) research to obtain marketplace feedback to drive strategic and tactical decisions. At the heart of this strategy, researchers and executives want to know how to improve the customer experience. While CX research is a powerful management tool, research suggests that the majority of CX programs need significant improvement (Allenson 2016). Most CX research improvements put forth by authors either focus on how to better use CX data to drive improvements or on improved research methods to collect and analyze data. This article will examine new CX research analysis tools for conducting key driver analysis.

Key driver analysis is a common procedure for statistically inferring the importance of CX attributes (independent variables) that drive the customer experience (dependent variable). Yet there are critical assumptions and limitations of key driver analysis that are frequently ignored. Two of these limitations are ignoring the existence of different key driver segments in the customer base and multicollinearity associated with independent variables or CX attributes. Academic researchers have developed new statistical modeling techniques to overcome both of these limitations. For example, latent class regression (LCR) has been employed to identify key driver segments in the customer base while correlated components regression (CCR) has been developed to overcome problems associated with

multicollinearity. The purpose of this article is to put forth a process for using both LCR and CCR to conduct key driver analysis with CX data.

In a key driver analysis, CX attributes are given importance scores that inform management about which CX attributes have the most impact on driving the customer experience. In addition, CX attribute importance scores also drive the prioritization of improvement opportunities. CX researchers often use quadrant analysis to prioritize improvement opportunities. Quadrant analysis simultaneously examines CX attribute importance and performance scores to determine which CX attributes should be prioritized for improvement opportunities. If CX researchers report biased attribute importance scores, then biased improvement opportunities will likely be the result. Implementing LCR and CCR for key driver analysis will result in more accurate, valid and reliable CX attribute importance scores.

Basic principles of LCR and CCR will now be put forth followed by a research approach that employs these statistical techniques in a complementary manner.

Latent class regression

Path modeling techniques (i.e., multiple regression, structural equation modeling) assume that one model (i.e., one key driver analysis) is appropriate for the entire population of customers. The assumption suggests that all customers have the same needs and use the same evaluative process, yet this is usually false. Practitioners should expect that customers are different and will have varying needs and preferences. If CX researchers believe that customers have different needs, then

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they should use statistical techniques designed to uncover and identify different key driver segments.

Latent class regression has received much research attention over the last decade because it does NOT assume that one statistical model (i.e., key driver analysis) is appropriate for the population. Path modeling techniques calculate the single model or equation that best fits all of the data and in that process any differences between groups of customers get smoothed out.

LCR analysis is conceptually similar to multiple regression in that independent variables are used to predict a dependent variable. However, LCR creates a unique key driver analysis for each customer and then aggregates those customers who produce similar results. The number of homogeneous segments identified is determined by the data, rather than by dictating a one-size-must-fit-all solution. While LCR is predicated on the idea that many segments are mixed together in unknown proportions within the population, if the data indicates there is only one viable underlying segment, then LCR will produce results comparable to traditional CX analysis. The advantage of LCR is that it has the capability to identify different segments in the population and produce a customized regression equation (key driver analysis) for each segment.

Correlated components regression

Path modeling techniques have long been used to examine key driver importance scores for CX attributes. An important assumption and limitation with path modeling analysis is multicollinearity, which is essentially high correlation among the independent variables employed to predict a dependent variable. As a result of multicollinearity, it is common that the standardized beta coefficients from path modeling techniques can be heavily skewed, biased and simply wrong. Multicollinearity is a serious problem that can adversely affect the results of key driver analysis, causing decision makers to overprioritize some drivers and ignore the impact of others.

A number of new statistical tech-

niques have been developed to combat issues associated with multicollinearity. One relatively new statistical technique is called correlated components regression. As a result of using correlated components regression, research has demonstrated that the results will be more reliable, valid and accurate with holdout samples (Tenenhaus and Magidson, 2011). More specifically, correlated components regression delivers more reliable, valid and accurate standardized beta coefficients with the correct sign, size and significance level, allowing CX researchers to more accurately deliver CX attribute importance scores even in the presence of multicollinearity. In addition, because CCR results are guided and driven by cross-validation results, CCR significantly improves predictive performance with holdout samples, thus improving model performance in the population.

Overcome different assumptions

In the spirit of research triangulation, LCR and CCR are complementary statistical techniques that individually overcome different assumptions and limitations of path modeling techniques. We feel that these two techniques should be used together, yet there is little published research on exactly how to achieve this objective.

The purpose of this article is to fill this gap by proposing and demonstrating a process that employs LCR and CCR together to conduct key driver analysis. In this process LCR is used to let the data determine what the appropriate number of segments is, who belongs to which segment and what the appropriate key driver analysis is for each segment. However LCR alone does not guarantee that those customized equations for each segment will not be biased by the effects of multicollinearity. Thus LCR should then be followed up by using CCR to recalculate the equations for each segment in order to account for multicollinearity and thus improve the predictive performance of the key driver analysis within each segment.

The research process undertaken in this research study started with LCR so

that CX researchers could identify the number of key driver segments along with segment membership of their customers to each segment. Once the number of segments and segment membership was identified with LCR, then CCR was implemented to refine the regression model (key driver analysis) for each LCR segment.

To empirically demonstrate this new research approach, a Web-based CX survey was created for end users of a software program. The Net Promoter Score (NPS) question was implemented as the dependent variable. CX performance attributes were measured on a 1-to-10 scale, with 1 meaning "poor" and 10 meaning "excellent." To develop a list of CX attributes, interviews and focus groups were conducted with end users. The resulting list of attributes was shown to another group of end users, whose feedback was used to refine the wording for the following CX attributes: quality product and solutions; new software releases; overall value; training; understands your needs and requirements; performing like a trusted partner; saves you time and effort.

In the final sample, 1,500 respondents were invited by e-mail, with a password-protected link to take the survey. From this activity, 1,269 e-mails were successfully delivered, with 402 respondents completing the survey. After rigorously cleaning the data, 357 respondents with complete and quality answers remained in the sample, for a response rate of 28 percent.

Results

LCR analysis

Latent Gold 5.1 was the latent class regression software used to analyze the data. The researchers used the random seed default in the program, which means that 10 different starting points were randomly selected for each analysis, which is considered a best practice. From a practical standpoint, the sponsoring company thought that they could only respond effectively to at most three key driver segments. With this in mind, one-, two- and three-key driver segments were specified and evaluated in the LCR analysis.

Table 1: LCR Segment Selection	BIC	Classification Errors	R²
One-Segment Regression Model	1263	0	.79
Two-Segment Regression Model	1237	.22	.88
Three-Segment Regression Model	1263	.27	.92

Table 2: CCR Results for Each Segment		
CX Attributes	Segment 1	Segment 2
Quality product and solutions	.461	NS
Overall value	.152	NS
Understands your needs and requirements	.148	NS
Performing like a trusted partner	.105	NS
New software releases	.094	.201
Saves you time and effort	.056	.641
Training	NS	.112

NS means not statistically significant

LCR model evaluation and selection
The first step in LCR analysis is to identify the number of key driver segments in the data. To make this decision, the researchers relied heavily upon the BIC goodness of fit index. The BIC index accounts for parsimony, while simultaneously explaining model fit, with a lower BIC value showing strong evidence for a better fit. In addition to BIC goodness of fit index, the researchers also examined misclassification errors as well as R² values, along with researcher judgment. The researcher first specified and estimated a one-, two- and three-segment model.

Model evaluation and selection results are included in Table 1. The BIC index clearly suggests that a two-segment model is most appropriate, having a smaller value than both the one-segment and three-segment models. As the number of segments increase, so too will the misclassification errors. Thus, it is important to note the relative differences in misclassification errors. There is a large increase in misclassification errors as the model progress from a one-segment model to a two-segment model, with misclassification errors increasing from 0 to .22, and to .27 as compared to the three-segment model. As the number of segments increase, R² values will generally increase as well. For this reason, it is important to note the relative differences in R² values. Examining R² values, there is a relatively large increase in the variance of the dependent variable as explained by the independent variables when comparing a one-segment model (.78) to either a two-segment model (.88) with a much smaller increase for the three-segment model (.92). There is a .10 increase in R² value comparing a one-

segment and two-segment model, yet there is a .04 increase in R² values comparing a two-segment to a three-segment model. Examining R² values lends strong statistical support for a two-segment model. After examining the criteria to evaluate the appropriate number of segments, and gaining practitioner insight into the results, the researchers selected the two-segment model.

CCR analysis
LCR analysis provided segment membership for each customer in the sample. With this information, the researchers then used CCR to refine the regression models (key driver analysis) for each segment. CCR analysis was run for each of the LCR segments, resulting in two separate CCR models. For each CCR model, all CX attributes were entered into the analysis. CCR analysis was run employing the appropriate amount of regularization to combat multicollinearity among these independent variables. Stepwise analysis was implement-

Table 3: Customer Perceptions of Performance for Each Segment		
	Segment 1	Segment 2
Quality products and solutions	7.33	6.35
Saves you time and effort	7.30	5.96
Understands your needs and requirements	7.28	6.10
Overall value	7.24	6.47
Performing like a trusted partner	7.24	6.00
New software releases	7.20	5.92
Training	7.06	5.79
NPS	2	-66.00

ed to identify statistically significant relationships between the independent variables and the NPS. Stepwise analysis in CCR analysis is guided by cross-validation R^2 values and NOT the training data, a noted research limitation with traditional stepwise regression analysis. The refined regression equations from CCR for each LCR segment will now be discussed (see Table 2).

Key driver segment one – the "quality and value" segment
Segment one, the "quality and value" segment, represents 78 percent of the sample, making this a very large segment, representing the majority of the customers. CCR analysis of segment one resulted in implementing three components for the regularization process, suggesting relatively high levels of multicollinearity among the independent variables. The stepwise analysis process resulted in six statistically significant predictors and a very high R^2 value, suggesting that a very high level of variance in the dependent variable is explained by the predictor variables. The R^2 value for this key driver segment was .92 in the training data and .91 in the cross-validation data.

The regression model for this segment has six statistically significant predictors, with "quality products and solutions" having the largest beta coefficient (.461). One tier down, "overall value" (.152) and "understands your needs" (.148) have relatively large beta coefficients but much smaller than "quality products and solutions." "Performing like a trusted partner" (.105) and "new software releases" (.094) have smaller beta coefficients, while "saves you time

and effort" (.056) has the smallest beta coefficient. "Training" is not a significant predictor for this segment.

The "quality and value" segment is driven most by quality, value and understanding needs but is also driven by the majority of CX attributes, suggesting that six CX attributes play a significant role in influencing the customer experience.

Key driver segment two – the "saves me time" segment
Segment two, the "saves me time" segment, represents 22 percent of the sample, being a relatively small segment in the study. The CCR analysis of segment two also resulted in implementing three components for the regularization process, suggesting relatively high levels of multicollinearity among the independent variables. The stepwise analysis process resulted in only three statistically significant predictors and a R^2 value of .71 in the training data and .67 in the cross-validation data. The R^2 values suggest a high level of variance of the dependent variable is explained by the predictor variables but a smaller amount relative to segment one.

The "saves me time" segment has three significant predictor variables. "Saves me time and effort" has the largest beta coefficient (.641), while "new software releases" has the second largest beta coefficient (.201), followed by "training" (.113). This segment is so-named because "saves me time" has the strongest influence on the customer experience.

Different in many ways
The key driver segments are different in many ways. Segment one is driven

by six CX attributes, while segment two is driven by only three CX attributes. More importantly, the key driver importance scores are significantly different for each segment. For example, segment one is primarily driven by "quality products and solutions," "overall value" and "understands my needs," whereas these attributes are not even significant key drivers for segment two.

In contrast, segment two is primarily driven by "saves me time and effort" whereas this attribute has the smallest key driver importance score for segment one. Likewise, "training" is a significant key driver for segment two yet is not a significant key driver for segment one. "New software releases" is a significant key driver for both segments yet has a significantly higher importance score for segment two.

Now that each key driver segment has been identified and defined, the researchers wanted to examine CX attribute performance for these segments. Do the key driver segments have significantly different levels of performance?

Performance scores for the CX attributes are relatively close in value for segment one (see Table 3), ranging from 7.06 to 7.33. The top three CX attributes in importance are also at the top of the list in performance scores, representing three of the top four CX attributes. Generally speaking, CX attributes with the highest importance also have the highest performance.

Performance scores for segment two are very different from those scores reported for segment one. When examining performance levels for segment two, performance scores for the CX attributes are significantly lower, ranging from 5.79 to 6.35. The top three CX attributes in importance (saves me time and effort, new software releases and training) also have the lowest performance scores. Clearly, these three CX attributes would be prioritized for improvement opportunities.

When comparing performance levels for the two segments, the two segments have significantly different levels of performance for all the CX attributes and NPS (t-test p values are all well below .05). Both segments

have low performance scores, which is typical of this software product line. However, segment two is significantly more dissatisfied. For example, the average performance score across all CX attributes is 7.24 for segment one as compared to 6.09 for segment two. Furthermore, the NPS score for segment one is 2, whereas the NPS score for segment two is -66.

Interesting and insightful

Employing LCR and CCR resulted in two key driver segments with significantly differently CX attribute importance scores as well as significantly different performance scores. While the rest of the analysis is beyond the scope of this article, the resulting story is interesting and insightful. The sponsoring organization targeted segment two, the "saves me time" segment, for improvement opportunities while a maintenance strategy was implemented for segment one, the "quality and value" segment. Why?

Segment two customers had a significantly higher likelihood of being "A" customers who were also more leading-edge in their software needs. Qualitative research confirmed the key driver analysis as well as yielding more insights into this segment. In short, segment two was very dissatisfied because the software did not meet their new and still-emerging needs. Thus, segment two customers had to spend a great deal of time and effort trying to make the software meet their needs through a variety of workarounds. This segment needed new software releases and features that would save them time and effort by meeting their needs. In addition, they needed training to help them with short-term workarounds but also to help them better utilize existing and future capabilities of the software.

If standard key driver analysis was employed with this data, insight into this emerging segment of customers would have been lost and a different improvement strategy would have been implemented. Instead of an improvement strategy tailored for a specific group of important customers with specific key driver requirements, the improvement

strategy would have been one-size-fits-all, without fitting anyone. ⓞ

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••• health care research

An incomplete diagnosis

Low health literacy and its impact on marketing research

| By the PMRG Health Literacy Initiative Committee

snapshot

A report on PMRG studies of the causes and effects of low health literacy and what marketing researchers can do about it.

Low health literacy is related to medication errors, device misuse, lower compliance and poor health but is traditionally not considered in marketing research studies. Based on studies conducted by members of the Pharmaceutical Marketing Research Group's Health Literacy Initiative committee, this article aims to raise awareness of how health literacy could be used as a lever to improve public health, while challenging marketing researchers to consider health literacy as both a responsibility and an opportunity in their research designs.

The Pharmaceutical Marketing Research Group (PMRG) is an independent, non-profit trade association whose purpose is to stimulate the advancement of marketing research in the health care industry. PMRG serves U.S. and global end-client researchers and service providers representing pharmaceuticals, biologics, medical/surgical device and diagnostics.

The PMRG Health Literacy Initiative (HLI) provides leaders in health care marketing research with the tools and understanding required to address the needs of all patients. It is a collaboration of members across the health care industry including manufacturers, payers and agency organizations. By providing education, resources and training, the PMRG HLI works to drive change within our industry and at the FDA. This change will ultimately reach and empower patients to take control of their own health and to better understand their conditions and treatments.

This article presents: evidence of the negative impact of low health literacy on compliance; the challenge low health literacy presents to marketing research; results from two marketing research studies, one with health care practitioners, the other with patients; and an outline of marketing researchers' responsibility and opportunity.

Well-being suffers

Patients' well-being suffers with poor understanding of their health and available treatments. Device and medication misuse can cause

problems for patients' health. In fact, poor health literacy is "a stronger predictor of a person's health than age, income, employment status, education level and race."[1]

Consider the following:

- In the U.S., 3.8 billion prescriptions are written every year. More than half of those prescriptions, however, are taken incorrectly or not at all.[2]
- In a survey of 1,000 patients, nearly 75 percent admitted to not always taking their medications as directed.[3]
- A study of over 75,000 commercially-insured patients found that 30 percent failed to fill a new prescription.[4]
- It's estimated that poor compliance costs the U.S. health care system $290 billion each year.[5]

There are many explanations of what leads to medication errors, device misuse and lower compliance. Although the high cost of medications is often referenced as a major reason for poor adherence, compliance rates improve only marginally when the cost barrier is removed. With an aging population, there has been an increase in the number of medications – with different dosing schedules – given to individual patients to treat a variety of chronic medical conditions. This can lead to confusion over treatment schedules. There can also be contraindications among various medications resulting in unintended side effects or other problems affecting adherence to a prescribed plan.

In 2009, Kaiser Permanente conducted an exhaustive literature review on the topic of non-compliance and found seven patient-related barriers to compliance:[6] forgetfulness; financial challenges; lack of knowledge about the medication and its use; lack of social support; cultural, health and/or religious beliefs about the medication; lack of health literacy; and denial or ambivalence regarding the state of their health.

Studies suggest a link

The key to understanding and improving compliance is the role of health literacy, which has been defined as "the degree to which individuals have the capacity to obtain, process, understand, [and act upon] basic health information and services needed to make appropriate health decisions."[7] Multiple studies suggest a link between low health literacy and low comprehension.

Research shows only 12 percent of the population is health literate.[8] People with low health literacy may not understand their health issues (e.g., diabetes, high blood pressure, high cholesterol). This lack of understanding can result in devaluing its treatment, which can negatively impact their health in the long term.

While certain populations are at greater risk for experiencing limitations on their health literacy (e.g., individuals who speak English as a second language), the state is by no means static. Rather, health literacy is dynamic, changing for individuals based on the context of any given situation. Even people with advanced education and reading skills can face health literacy challenges. Consider the stresses imposed by health emergencies. At such times, even the most health-literate individual may experience difficulties understanding or processing health information. Simpler and easier-to-understand patient materials, therefore, benefit everyone.

Those with limited health literacy are less likely to understand terminology, risks and benefits[9,10] and lower health literacy has been linked to poorer overall health outcomes – higher rates of hospitalization than in individuals with higher health literacy[11,12,13] and higher mortality rates than in individuals with higher health literacy.[14] And though the link is not definitive, the relationship between health literacy and outcomes likely reflects inadequate self-care behaviors.

Many factors affect a person's health literacy, including their reading ability, age, culture, the complexity of the information presented and language skills.[15] Some population groups are particularly vulnerable to health

literacy challenges: adults age 65 and over; those who don't understand or speak English well; minorities; and low-income populations.[16]

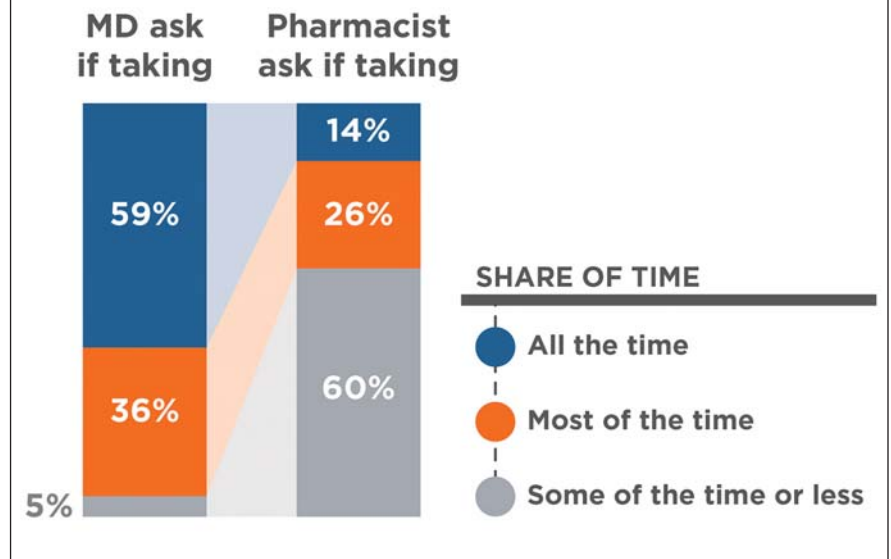## Main challenges for researchers

For marketing researchers, there are four main challenges that low health literacy presents:

Recruitment. Patients with low health literacy are traditionally screened out of samples because researchers want respondents who can understand the information provided in the study and can effectively communicate their feedback. This common practice leads to the exclusion of an important segment of the population. When the study has implications for communications to patients, such as patient education materials or instructions on using a device, this approach is deficient in research design and also doesn't allow for the learnings that will help create materials that can be better and more easily understood. It is difficult to recruit people with low health literacy and the tools are still being developed for properly screening for health literacy. While the Newest Vital Sign (NVS) tool (one we recommend for identifying people with low health literacy) has been validated for in-person research, it has not yet been validated for online research.

Participation. Patients who are lower in health literacy tend to be more reluctant to participate and voice their opinions. This lack of participation arises from lower confidence or embarrassment in their abilities, such as having difficulties speaking, reading and/or understanding – whether it is a challenge with the English language or medical terminology. Researchers must change the way they collect their data in order to make this work. For example, during in-person research, moderators should provide extended warm-up time at the beginning of the interview to build trust. They should also understand that bland or non-committal participation (e.g., "Yes, I agree" or "No, I do not like that") are a signal of potential problems and thus be prepared to shift activities as needed to get more-involved participation and better data.

Analysis. Once included into

Figure 1

MD ask if taking — 59% / 36% / 5%

Pharmacist ask if taking — 14% / 26% / 60%

SHARE OF TIME

- All the time
- Most of the time
- Some of the time or less

the research, data for low health literacy patients should be analyzed separately from those with adequate literacy to ensure the needs of this at-risk group are not missed. With the proper data collection techniques, researchers should have uncovered the true reactions of the low health literacy group to be included in consideration, rather than being lost in background noise.

Stimuli. The stimuli used in research – which are often closely linked to the actual communication to the patients – should be formatted to follow best practices for health literacy. Some of those best practices include (see the online version of the article for a more complete list):

- avoiding jargon, abstract words, technical terms, statistics, abbreviations and acronyms;
- using a type size that is easy to read and as large as possible (at least 12-point text);
- using sentences and paragraphs that are short, simple and direct;
- providing action-oriented materials, not just facts;
- grouping related information into smaller, logical pieces;
- avoiding complicated diagrams, graphs or technical visuals.

To better understand how marketing research may be affected by the challenges of low health literacy and to quantify the impact that utilization of health literacy best practices

may have in marketing research, the HLI Committee conducted two marketing research studies, one with health care practitioners and another with patients. As noted above, special efforts were taken to include low health literacy patients who are not usually included in traditional market research studies.

Health care practitioner study

Sample and method. Conducted by Doctor Directory. Physicians (n=100) and pharmacists (n=50) were asked in an online 10-minute survey about compliance and communication with their high blood pressure (hypertension) patients.

Key findings. In terms of compliance, there is a disconnect between the physicians and the pharmacists. From the physician perspective, most of their patients with high blood pressure understand their prescription instructions and are taking their medication as prescribed.

Physicians believe: 78 percent of patients are taking their medication as prescribed and 88 percent understand how to take their medication.
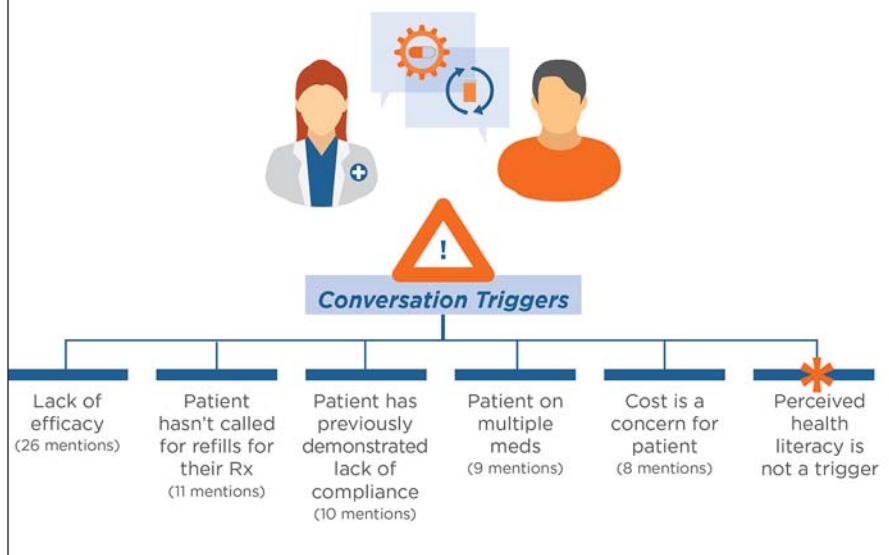
Pharmacists provide a less-optimistic patient compliance story. Most pharmacists say: up to 24 percent of hypertensive prescriptions are abandoned; up to 24 percent of initial starts are not refilled; and up to 49 percent are refilled late.

This gap between the perceptions of physicians and pharmacists on patient compliance is concerning and

Triggers to ask About Compliance

About 60% of doctors indicated that there are particular circumstances in which they will ask about drug compliance.

Conversation Triggers

Lack of efficacy (26 mentions)	Patient hasn't called for refills for their Rx (11 mentions)	Patient has previously demonstrated lack of compliance (10 mentions)	Patient on multiple meds (9 mentions)	Cost is a concern for patient (8 mentions)	Perceived health literacy is not a trigger

there is no formal process connecting physicians and pharmacists to allow feedback on medication compliance. In terms of communication with the patients, doctors and pharmacists have two different roles. Doctors are focused more on telling patients how to dose and asking if they are taking their medication during follow-up visits when they occur, while pharmacists are not directly asking if patients are taking their medication (Figure 1). There is a gap in care between the roles of physician and pharmacist that widens with low health literacy.

Physicians and pharmacists agree that between 15 and 20 percent of patients have hearing difficulties or difficulties with understanding or reading English.

Health literacy is not mentioned when physicians are probed as to what triggers them to ask compliance questions of patients (Figure 2). This is the case despite physicians recognizing that some of their patients may experience communication challenges (e.g., hearing difficulties, limited ability to read and/or understand English, etc.).

None of the mentioned triggers validate if a patient understands their diagnosed condition or the short- and long-term benefits of their treatment.

As we see in the above research, noncompliance may be worse than physicians are aware because there is no formal feedback for when a patient fills, takes or stops taking a medication. There is no understanding of why a patient doesn't start or stops taking a medication. Without feed-

back, no follow-up conversations can occur nor can education on the condition, benefits of treatment or safety concerns be addressed.

Patient study

For the patient study, the objectives were to: assess individuals' health literacy; assess comfort with filling out medical forms; and determine how an individual's health literacy impacts their ability to read a medication label.

Sample. Fielded by MarketVision Research. Research was conducted with 805 patients, half of whom had high blood pressure and half among the general population. Special recruitment was in place to ensure adequate numbers of patients with low income and low education. Respondents completed a 10-minute online survey.

Method. Although the Newest Vital Sign has only been validated for in-person research, we adapted the tool for online use. A component of this research was used to understand how the NVS may be administered online. The measure used was a series of six questions about an ice cream nutrition label. Respondents were grouped into adequate vs. limited health literacy based on their score. Later in the survey, respondents were given a series of five questions about a drug label. Half of each group was randomly given the traditional label and half was randomly given the optimized label.

Stimuli. For the purposes of this

Figure 3
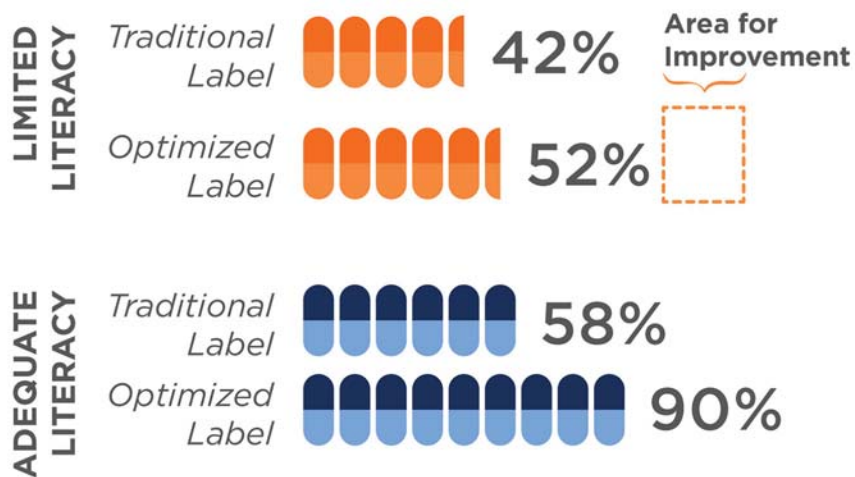
study, the traditional pharmaceutical label was modified into the optimized label by following some of the health literacy best practices described above. (See the online version of the article for examples of the traditional and optimized labels.) This was a proof-of-concept study, to allow us to document the effect a minimum change would have. If this were an actual marketing research study for a product to be launched, we would recommend engaging a health literacy consultant and conducting research with people who have low health literacy.

Key findings. Contrary to expectations, the improved label did not have a big effect among those with low health literacy, with only slightly improved comprehension of the prod-

uct label (Figure 3). This highlights the importance of additional work such as including low health literacy respondents in research and hiring a health literacy consultant to achieve a better result for this group. Most surprising to us, the biggest positive effect on comprehension was seen among those who had adequate health literacy. The comprehension level was raised by over 30 percent, to a level indicating that almost everyone with adequate health literacy understood the basics about the drug. This illustrates a side benefit of including those with low health literacy in our research – that by doing so we will improve comprehension for all.

This patient study shows the need to: include low health literacy patients in the sample design; separately analyze performance of low health literacy patients; and carefully craft patient communications using best practices and expert consultation.

Key lever

Health literacy can be a key lever in improving patients' health. With some simple techniques, comprehension can increase, which could lead to improved compliance, as well as reduced medication errors and device misuse.

As discussed, there are four challenges that low health literacy presents to marketing research.

Recruitment: Are special efforts used to include patients with low health literacy in the sample?

Participation: Are special techniques used to gain their true reactions?

How to get involved

The PMRG Health Literacy Initiative welcomes you to:

- Connect with us to join the group or to get more information: http://bit.ly/2vUChGj
- Partner with us on future studies.
- Consider health literacy in your marketing research study design so as to not inadvertently exclude low health literacy patients from your sample.

Special thanks to the committee members who collaborated on these research studies: Heather Collins (Baltimore Research); Tom Donnelly (MarketVision Research); Scott von Lutcken (Merck); Lynn Ricker (KnowVanta); Jeffrey C. Adler (Vault Consulting); Heather Turkoz (UCB); William Stone (Sommer Consulting); Karen Tibbals; and John Ewing (formerly of Everyday Health/Doctor Directory).

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Analysis: Are their results scrutinized vs. dismissed as background noise?

Stimuli: Were the tested materials formatted optimally?

As researchers, we are responsible for the proper design, execution and analysis of our studies. The research may be flawed if patients with low health literacy are not considered.

Beyond your responsibilities as a marketing researcher, consider your opportunity to provide added value to your client, as well as your client's client. Armed with the above knowledge, you are empowered to help move the industry towards better market research and, ultimately, higher levels of patient health. ○

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snapshot

How pharmaceutical marketers can help doctors and patients get on the same page during office visits.

••• health care research

There's a disconnect here

Adherence study finds gaps in doctor-patient communication

| By Jonathan Weiser

Twenty minutes, tops. That's the average interaction between doctor and patient in a typical office visit. But what if it's not typical because the patient has just been diagnosed with a disease? Discussions regarding diagnosis, treatment, possible medication and recommendations may occur but it's hard to understand what is resonating with patients who are given so much information in such a short period.

We know gaps in communication occur and effective patient-physician communication is often linked to adherence. In fact, our study on adherence last year found that at the point of diagnosis, patients frequently leave a physician's office not knowing what condition the doctor diagnosed, not clear on what they should do and not even knowing if they've gotten a prescription. Research has shown that comprehension, retention and action can improve through the use of visual stimuli in physician-patient interaction.[1,2,3] We've also found visual stimuli to be highly effective when uncovering patient and practitioner insights. Using images as catalysts helps engage study

participants and can also help them open up around a sensitive topic to further identify what's driving behavior and emotions around treatment.

For our adherence study, we partnered with one of the top 25 pharmaceutical companies to conduct qual-quant research with chronic obstructive pulmonary disease (COPD) patients and health care providers to find out how both sides viewed their relationship and what communication gaps exist before diagnosis, at diagnosis and as treatment continues.

The online methodology integrated interactive exercises – including a retrospective diary, projective thought bubbles and a collage-building tool – with standard measures in order to explore this relationship. More specifically, we looked at what doctors believed they were communicating effectively and what information patients were really retaining. We asked about experiences with COPD, the point of diagnosis, experiences with their PCPs and communication around medication.
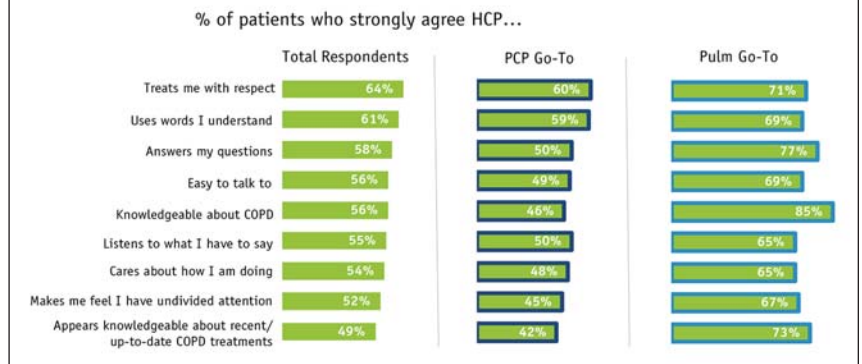
Uncovering true feelings

First, we explored the relationship between patients and physicians. Neither are likely to find out how the other really feels in person, but uncovering true feelings is of utmost importance in understanding why gaps occur and what can be done to overcome them. Findings revealed both patients and physicians were mostly aligned when it came to frequency of visits and amount of time spent together. However, how each side viewed the strength of their relationship differed; many doctors overestimated, with 91 percent agreeing their relationship with patients was strong, while only 65 percent of patients said the same.

Next, we aimed to understand the types of physicians patients chose as their go-to health care provider for managing COPD. Interestingly, the majority of patients (64 percent) said they frequented PCPs. Comparatively, only 24 percent chose pulmonologists, suggesting an underutilization of specialists. This is important to note as patients were later asked how they felt about the HCP who treated them and a higher percentage of patients treated by pulmonologists felt more positive towards their physician than patients treated by PCPs, especially regarding the doctors' knowledge and being up-to-date on COPD treatments (Figure 1).

To describe how they felt about HCPs and COPD in general, patients created an eCollage, an online collage-building exercise used to elicit emotions and visual understanding.

Figure 1: Patients are more positive toward pulmonologists, especially regarding knowledge and special treatments

% of patients who strongly agree HCP...

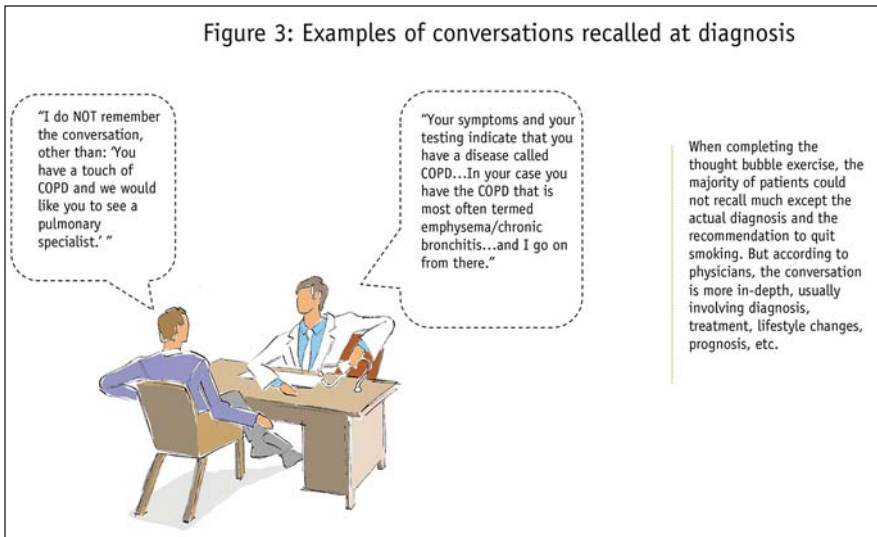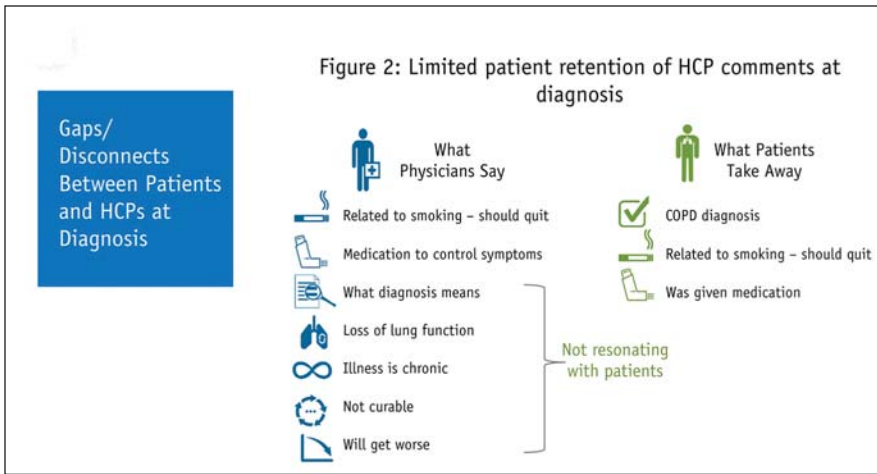|	Total Respondents	PCP Go-To	Pulm Go-To
Treats me with respect	64%	60%	71%
Uses words I understand	61%	59%	69%
Answers my questions	58%	50%	77%
Easy to talk to	56%	49%	69%
Knowledgeable about COPD	56%	46%	85%
Listens to what I have to say	55%	50%	65%
Cares about how I am doing	54%	48%	65%
Makes me feel I have undivided attention	52%	45%	67%
Appears knowledgeable about recent/up-to-date COPD treatments	49%	42%	73%

Patients mostly felt positive about their doctors, expressed via images illustrating HCPs caring, listening and answering questions. However, some collages revealed concerns patients had such as feeling rushed by doctors and the doctor not being helpful or not caring – possibly contributed by the type of doctor patients frequented.

On the other hand, doctors did not feel as positively towards patients. The study shows HCPs are frustrated with patients – with 70 percent finding COPD challenging to treat. Many patients continue to smoke, which only exacerbates symptoms, and HCPs don't believe patients are doing their research on the disease, leading to their having a hard time understanding details around it.

So how can these disconnects in the relationship between patients and doctors be fixed? Marketers of pharmaceutical companies can enable a more proactive link between PCPs and specialists to foster patient dialogue. Patients can better understand their condition and the importance of seeing specialists to allay any fears and misunderstandings they have.

Overall relationship

The first part of the study provided insight into feelings of patients and physicians around the overall relationship but we really wanted to uncover the communication gaps occurring around the diagnosis of a disease. The study probed the period during which patients begin to experience symptoms. Here, both patients and HCPs agree there is considerable time between the moment patients first start to have symptoms and the moment doctors actually diagnose COPD. We asked patients about kinds of symptoms they experience and the emotions they feel. Generally speaking, patients say symptoms are usually not severe enough to lead to diagnosis, providing one reason for the lapse.

Figure 2: Limited patient retention of HCP comments at diagnosis

Gaps/Disconnects Between Patients and HCPs at Diagnosis

What Physicians Say
- Related to smoking – should quit
- Medication to control symptoms
- What diagnosis means
- Loss of lung function
- Illness is chronic
- Not curable
- Will get worse

What Patients Take Away
- COPD diagnosis
- Related to smoking – should quit
- Was given medication

Not resonating with patients

Figure 3: Examples of conversations recalled at diagnosis

"I do NOT remember the conversation, other than: 'You have a touch of COPD and we would like you to see a pulmonary specialist.' "

"Your symptoms and your testing indicate that you have a disease called COPD...In your case you have the COPD that is most often termed emphysema/chronic bronchitis...and I go on from there."

When completing the thought bubble exercise, the majority of patients could not recall much except the actual diagnosis and the recommendation to quit smoking. But according to physicians, the conversation is more in-depth, usually involving diagnosis, treatment, lifestyle changes, prognosis, etc.

Next, we explored the key drivers of this disconnect among HCPs. Many HCPs say patients are in denial about their condition and they also hold off diagnosing the patient because they think it is too early to be completely sure. Another disconnect emerges in terminology used by patients and doctors. Specifically, the ways to refer to COPD symptoms and the condition itself vary, so it's not surprising misunderstandings occur.

Marketers can step in here with informational campaigns to help create awareness of specific diseases to heighten sensitivity to symptoms. They can also develop strategies to encourage uniformity in visuals and language used in talking about COPD and symptoms. Both patients and physicians may be less unsure of the condition they have and can regain valuable time typically spent undergoing treatment.

Have intense emotions

The point of patient diagnosis may be most challenging. With new influxes of information, physicians want to convey as much as possible but patients have intense emotions and feelings; thus, only very little of what the doctor says at diagnosis is actually retained. For example, the study found 92 percent of HCPs recalled recommending patients quit smoking at diagnosis. However, only 64 percent of patients remember the same. The projective thought-bubble exercise also uncovered other details patients don't recall, such as what the diagnosis means exactly, the fact that the illness is chronic and not curable, and that it will only get worse. Basically, the only aspects patients take away from the visit are the actual diagnosis and that they are given some kind of medication (Figure 2). Other details around treatment and next steps go unrecalled. But again, the importance of seeing a specialist (pulmonologist) results in a higher percentage of satisfied patients and those satisfied are more likely to retain information at diagnosis.

At such a crucial moment, marketers can help close communication gaps by connecting patients to support programs to reinforce disease management and they can build understanding around how to treat specific symptoms using visuals to illustrate benefits. As noted earlier, research has already proven visuals help patients retain information; by providing materials to HCPs and their offices for distribution, marketers can help patients be more likely to remember what they learn by giving them information they can refer back to at a more relaxed time.

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Gaps still occur

In the visits that follow diagnosis, are patients more likely to recall what they are told? Results from the study reveal unfortunately, communication gaps still occur (Figure 3). HCPs say conversations that follow revolve more around symptoms patients experience, while patients recall mostly talking about medication. When patients are asked what they would like to talk about, they discuss needing broader input on overall health management and treatments. They seem little-informed about medications before they're prescribed and many leave the doctors' office with outstanding questions, particularly surrounding efficacy and treatment side effects.

When HCPs were asked what they tell patients about a medication, they focus more on instructions for using the treatment (how, how often to use, etc.) than on its efficacy and side effects. In fact, it is interesting to note an alarming 21 percent of patients recall only needing to use controller (daily) inhalers when experiencing symptoms, while 95 percent of physicians recall recommending daily usage. Again, fewer patients of pulmonologists are unclear on using inhalers, further reinforcing earlier findings of PCP vs specialist visits.

The patient disconnect around medication starts early. So how can HCPs ensure instructions are really getting through to patients? Here, marketers can address gaps related to overall health management by providing educational follow-up materials. They can also build awareness for materials and programs outlining steps for proper medication use and the benefits of doing so. Doing this takes the pressure off both sides and can lead to higher satisfaction among patients with doctor visits.

Understand what's really going on

In sum, this study reveals the communication gaps between patients and physicians that run the length of the relationship – from before the diagnosis of an illness to the point of diagnosis and even as treatment continues. In addition, these gaps also prove to have an impact on adherence. However, getting behind reasons for disconnects can help us understand what's really going on in patients' minds and what's driving behavior. While this study highlights patients with COPD, the same thoughts, feelings and suggestions can be applied to other diseases and illnesses. And as adherence continues to be a challenge among pharmaceutical companies, this research provides insights for marketers on how to develop strategies to fill gaps and improve communication between patients and physicians. Ⓠ

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Charting a course

Identifying complex treatment patterns through multi-line treatment simulation

| By Roger Green

snapshot

A look at a method for forecasting market share and revenue for agents receiving combination use in multi-line therapies.

Increasingly, biopharmaceutical manufacturers bring value and earn revenue by improving the treatment of complex diseases. Agents entering these markets gain a significant portion of their revenue from second- and later-line therapies, frequently in combination therapies.

Forecasting later-line units and revenues for these agents presents unique challenges:

• Traditional allocation methods cannot absorb the complexity in treatment regimens and patient histories. Consider the endocrinologist asked to estimate the percentage of third-line patients initiating a specific GLP-1 therapy. The endocrinologist would have to estimate the percentage of patients that would be good candidates for GLP-1 therapy. S/he would have to reduce this number by patients who initiated GLP-1 therapy in second-line. Amongst the remaining patients, s/he would have to eliminate patients whose formularies preferred a different GLP-1 and those whose formularies mandated this particular agent. Finally, s/he would have to consider how many considered themselves unable to absorb the copay and, simultaneously, unwilling or unable to comply with the copay card program. For this estimate to be accurate, s/he would also have to factor out the effects of various recall biases. This is an exceptionally challenging calculation to get right within the minute of survey time we allow for an answer.

• Chart-pull studies provide more accurate views of the patients the study covers. However, these studies trade-off large costs against adequate sample sizes and frequently provide correlated variables that limit analytics. A typical study might include detailed exploration of five patients and a limited number of additional questions. This makes collecting the number of cases required for detailed analysis an expensive proposition. Data in most chart-pull studies demonstrate levels of correlation high enough to complicate multivariate analysis. Many include enough missing data, which makes analysis even more challenging.

Whichever method you prefer, these challenges present significant barriers in determining how second- and later-line treatment patterns will evolve as new agents enter market and clinical

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trial results highlight the value of novel combination therapies.

Patient simulation methods can address these issues but only if the simulation captures market complexity adequately. Many simulation methods fall short, particularly in the areas of patient complexity. Most researchers simulate patients in five to seven two- or three-level variables because an individual physician might not consider more than five to seven characteristics. This does not reflect the fact that different physicians consider different characteristics. It may take as many as 20 variables to incorporate the five-to-seven that each physician will consider.

In addition to being a more accurate representation of the decision process, increasing the number of variables allows the researcher to explore two issues:

Multiple ways to describe a broad attribute. The simple phrase "efficacy" or "safety" may represent multiple specific metrics. These may not carry equal weight in the mind of the psychiatrist, who may care more about how well a medicine treats positive symptoms of schizophrenia than negative symptoms – or vice versa.

Attributes that might affect prescribing indirectly or as secondary factors. The same psychiatrist who wants to see multiple descriptions of symptoms will want to track patient weight and blood sugar levels. However, s/he may also consider family cardiovascular history and rate of recent weight gain when prescribing, but these might not make a list of "seven most important."

One method created to address this specific issue is line of therapy treatment simulation. In line of therapy simulation, physicians treat a patient from initial diagnosis through multiple lines of therapy. The patient description incorporates as many as 25 clinical, demographic, insurance and motivation-based variables. It evolves through rounds of therapy to incorporate variability in clinical response to whatever regimen the physician prescribes and associated changes in the patient's condition. Prescribing choices will mimic the entire range of possibilities the prescriber considers, ranging from watchful waiting through complex therapies to palliative care.

A typical study will include three to four different simulations. The first one will measure current market behavior, followed by two to three rounds of future events spaced 12-18 months apart. Each
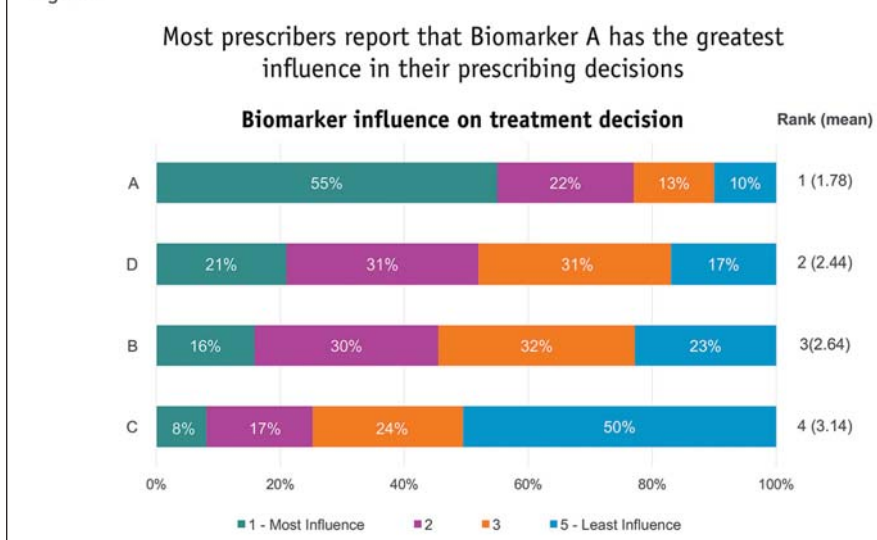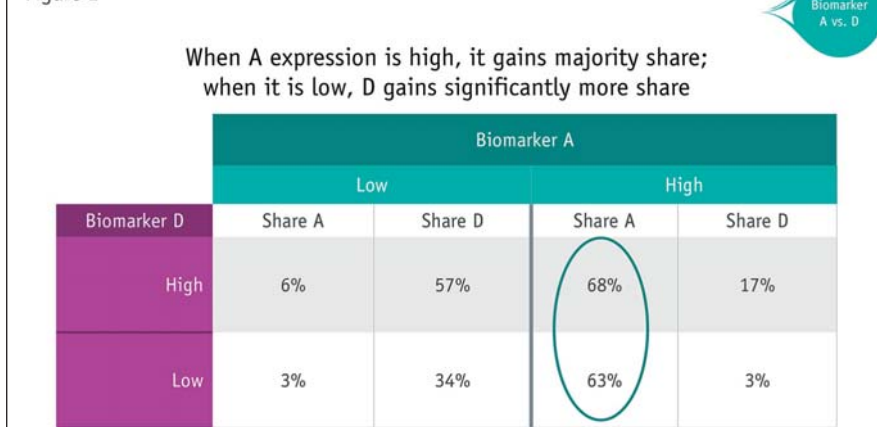

Figure 1

Most prescribers report that Biomarker A has the greatest influence in their prescribing decisions

Biomarker influence on treatment decision

	1 - Most Influence	2	3	5 - Least Influence	Rank (mean)
A	55%	22%	13%	10%	1 (1.78)
D	21%	31%	31%	17%	2 (2.44)
B	16%	30%	32%	23%	3 (2.64)
C	8%	17%	24%	50%	4 (3.14)

Figure 2

Biomarker A vs. D

When A expression is high, it gains majority share; when it is low, D gains significantly more share

Biomarker D	Biomarker A			
	Low		High	
	Share A	Share D	Share A	Share D
High	6%	57%	68%	17%
Low	3%	34%	63%	3%

round will include new product introductions or indications, publication of clinical studies describing advances in combination therapies and changes in reimbursement rules.

The core analytical package for line of therapy simulation focuses on predicting how market shares will evolve as new products and information enter the market. Analytics not only produce share forecasts but also: source of share analysis across time periods; common multi-line prescribing patterns and the frequency for each pattern; and prescriber segments that are most likely to prescribe each multi-line pattern and patients that are most likely to be treated with that pattern.

Other analytics can identify the patient, physician and product perception characteristics that have the greatest impact on treatment decisions at a given line of therapy.

Case study: Oncology
Message: Absent simulated prescribing, hypotheses that seem reasonable are often wrong.

Our client acquired co-marketing rights to a new asset one year before its launch in a key target market. The product treated a tumor type where most patients exhibit one of four biomarkers. Call them A, B, C and D. Well-established in-market agents treated patients exhibiting A or B. A different agent had recently received an indication to treat patients exhibiting C. Our client's product treated patients exhibiting D.

The study was designed to provide a five-year forecast, key prescriber segments and value drivers for creating promotional messages. Client forecast anticipated an aggressive first-line share among targeted patients. The line of therapy simulation estimated a similar share but across three lines of therapy. By tracing treatment patterns across lines of therapy and patient types, the simulation model identified potential share slippage not included in the client model.

The key issue involved treatment patterns for patients expressing multiple biomarkers. Patients could exhibit high

Figure 3

When D expression is high, it gains the larger share;
when it is low, it still competes effectively vs. B

Biomarker B vs. D

Biomarker D	Biomarker B			
	Low		High	
	Share B	Share D	Share B	Share D
High	4%	53%	17%	36%
Low	29%	30%	37%	24%

levels for 0-4 biomarkers. The client forecast anticipated that patients expressing Biomarkers A (the most established marker) and D (client product) would divide share between the two agents, while patients expressing high levels of D and B or D and C would receive the agent for D.

The simulation study asked prescribers to rank relative influence of the four biomarkers on the treatment decision. Prescribers indicated that A was the most influential biomarker, B and D were comparable and C was far weaker (Figure 1).

Results of a multi-line treatment simulation revealed different, more complex patterns. Competition between Biomarkers A and D reflected expression of A. When the patient expressed high levels of A, A received far more prescriptions than D, even when D expression was relatively low (Figure 2). This finding is consistent with how much influence prescribers felt expression of A would have on their decisions.

Competition between Biomarkers B and D produced different patterns (Figure

3). Whenever D was high, it received far more share than B. When D was low, it still achieved share between 24 percent and 30 percent (comparable numbers for A when it was low were 3 percent and 6 percent). In fact, high, D performed only slightly better when biomarkers were both were high (36 percent) than when both were low (30 percent). The degree to which D levels drove prescribing are surprising, given that prescribers stated the two would have roughly equal influence.

Conclusion: Simulating patient treatment across multiple lines of therapy can produce benefits in forecasting, modeling and value driver identification.

Level of insight

Forecasting patient treatment across multiple lines of therapy can provide a level of insight that conventional techniques cannot match. This approach should work well in any complex multi-line disease, including oncology, hematology, autoimmune disease, diabetes and CNS diseases.Ⓠ

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The truth is in the telling

How language-based emotion research can uncover customers' feelings

| By Chuck Bean

snapshot

Chuck Bean looks at the benefits of using language, rather than non-conscious approaches, to understand emotional drivers.

Scientists have long known that there is often great disparity between our internal and external selves – how people say they feel about something and their actual, genuine feeling. It's not that we're deceptive – it's often a subconscious process. You might say it's just human nature. This disparity has been measurable using complex fMRI brain imaging, biometric evaluations, facial scanning technology and other physiological and psychological research techniques. Naturally marketers quickly realized the potential in these technologies: Rather than relying on educated guesses and interpretation, branding and marketing initiatives could be tested with amazing accuracy. Thus, the birth of emotion research.

Lab-based techniques have two major limitations: They are complicated to use and they are not easily scalable to large customer groups. It turns out another way of getting the same insights, without the need for such complex equipment, exists in the form of language-based emotion research techniques. These methods rely on comprehensive word-association dictionaries along with powerhouse computing to dig into what subjects declare via written or verbal response to decipher their true, authentic sentiments, going beyond their surface-level responses.

Here's an example: An emotion language analysis study was conducted on behalf of a hand-soap manufacturer to find out how consumers feel about handwashing. At first, respondents in this study described their feelings using words associated with pleasant emotions such as security and confidence. But then it got more interesting: As the consumers elaborated further, some surprising differences emerged between women's and men's feelings. To most women, the idea of handwashing triggered consistently pleasant emotions. But when men were asked to elaborate, most of their language revealed that they actually felt handwashing was an annoying chore and they began using words

quirks.com/articles/2017/20171009.aspx

associated with unpleasant feelings such as anger and dread. This dichotomy led to a valuable segmentation opportunity.

While marketers of consumer goods and services were first to use emotion research, marketers of industrial products have begun to take a closer look at how emotions influence B2B decision-making, as discussed in Andrew Dalglish's recent blog post on Quirk's Web site ("Yes, even B2B buyers are influenced by emotion"). This type of research will continue advancing as new technologies offer scalable and cost-effective methods.

Difficult to interpret

As we've seen, the earliest research on underlying emotions was mainly confined to laboratory settings, where sophisticated technology such as fMRIs and biometric evaluations was used to gauge customers' responses to advertisements and other stimuli. While this research could be useful in measuring consumers' level of excitement, the responses could be difficult to interpret by marketers, requiring scientific sherpas to explain results, particularly as findings were socialized beyond the core research team. More captious is that machine-based evaluations are time-consuming and nearly impossible to scale financially. Unlike surveys and panels, or even one-on-one interviews, lab-based techniques are expensive by orders of magnitude – imagine strapping in 5,000 people to an fMRI machine for questions about New Coke. While some day this approach may be possible through advances in technology, today it's a non-starter for most marketing applications that require scale.To overcome these limitations, researchers have developed new techniques that use language to assess what's on customers' minds and determine the underlying emotional tones. Here are some examples of these techniques, which use natural language processing (NLP):

- **concept analysis or text analytics**, which can identify common themes in text collected through

Comparison of Emotion Research Techniques

Research method	Biometric technologies		Language-based techniques		
	Lab-based fMRI brain imaging, retinal scans, etc.	Cloud-based facial expression analysis	Manual review of customer verbatims	Sentiment analysis	Emotion language analysis
Technical requirements	Lab setting	Computer or smartphone with camera	None	Cloud-based or SaaS	Cloud-based
Typical time frame (weeks)	8-12 weeks	8-12 weeks	Varies by number of respondents	2-3 weeks	2-3 weeks
Automated results of positive vs. negative feelings	No; requires interpretation	yes	no	yes	yes
Automated multi-dimensional analysis	no	no	no	no	yes

surveys, reviews, customer verbatims and online feedback;
- **sentiment analysis**, which assesses whether customers' comments are positive, negative or neutral; and
- **emotion language analysis**, which identifies and evaluates both surface and underlying emotions along multiple dimensions.
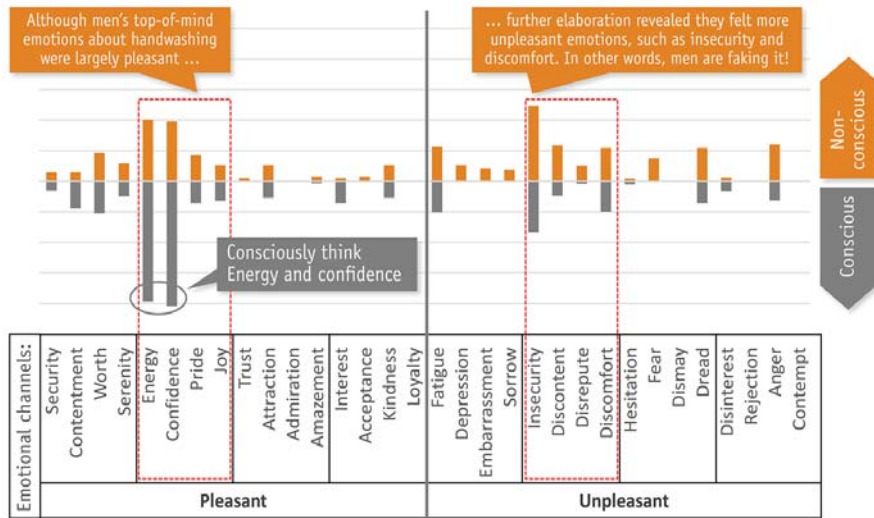
You can develop your own taxonomy and framework to evaluate customers' feedback that you have already collected. For ideas on how to do that, see "Scaling the data mountain: A practitioner's guide to unlocking insights from customer feedback," by Kieser and Williams, *Quirk's*, January 2017. Or you can use one of the new cloud-based tools for data collection that has built-in algorithms for evaluating how customers' language reflects their underlying feelings.

The more they reveal

As one example of these methods, emotion language analysis (ELA) was developed by a team of experts in psychiatry and information technology based on the widely accepted clinical principle that the more patients talk, the more they reveal. The ELA approach has been applied to a variety of emotion research techniques including a cloud-based gamification survey that asks customers to respond to a simple question such as, "How do you feel about X?" (There are a number of techniques for employing emotion research. See the accompanying comparison chart.)

Customers begin by identifying the first words that come to mind to describe their feelings. Then as they proceed through the process, they refine their responses in a variety of ways by identifying additional words associated with their emotions. This flow of words begins to widen the stream of emotional undertones detected. Linguistic algorithms and a 10,000-word "emotion diction-

Figure 1

Although men's top-of-mind emotions about handwashing were largely pleasant ...

... further elaboration revealed they felt more unpleasant emotions, such as insecurity and discomfort. In other words, men are faking it!

Consciously think Energy and confidence

Non-conscious

Conscious

Emotional channels: Security, Contentment, Worth, Serenity, Energy, Confidence, Pride, Joy, Trust, Attraction, Admiration, Amazement, Interest, Acceptance, Kindness, Loyalty, Fatigue, Depression, Embarrassment, Sorrow, Insecurity, Discontent, Disrepute, Discomfort, Hesitation, Fear, Dismay, Dread, Disinterest, Rejection, Anger, Contempt

Pleasant — Unpleasant

ary" categorize words into "emotion channels," so the emotions can be analyzed along multiple dimensions to diagnose the customers' level of interest, engagement and passion.

The contrast between customers' initial top-of-mind responses and their further elaborations can be illuminating. The chart in Figure 1 presents findings from the handwashing study mentioned earlier. The gray bars in the bottom half of the chart reflect the initial words that men used to describe their top-of-mind feelings, which you can see are primarily positive (as shown in the lower-left quadrant). But when asked to elaborate with other associated words (as shown in the top half of the chart), men began to use more words linked to unpleasant feelings (as shown in the gold bars in the upper-right quadrant).

These findings presented an important segmentation opportunity for the hand-soap producer: Its appeals to women could focus on fragrance and skincare benefits, while it could offer men time-saving solutions such as touch-free soap dispensers.

An opportunity

As we've discussed, the data shows that customers tend to rely more on their hearts than their heads when it comes to making purchase decisions. Rather than this illogical behavior being a problem, it can be an opportunity for marketers to tweak their strategies and better reach their

customers. Here are a few of the areas where language-based emotion research can lead to important insights for your marketing strategy:

- **Brand positioning.** What emotions do customers associate with your brand and your competitors' brands? Does your brand trigger emotions linked to the attributes that are most important for brand leadership?
- **Brand image.** Does the brand image you're developing align with a desirable emotional image for the brand? Your brand could be the market leader but if customers harbor negative emotions toward the

brand, your market position could be vulnerable.
- **Brand messaging.** Finding the language that will hit the right emotional triggers can be key to the success of your advertising and promotional campaigns.
- **Customer experience.** Emotion research can give you rich insights about the customer's journey, such as where your customers are developing – or losing – essential emotional connections with your brand, product or organization.

Ongoing monitoring

Customers' emotions are a moving target, rippling in response to individual circumstances and market forces, which is why ongoing monitoring of emotions is a critical part of emotion research. After you've performed an initial assessment of customers' feelings and responded to the implications of those findings, you should develop a plan for monitoring customers' emotions in response to changes in your strategy (and to your competitors' actions). With the new language-based emotion research techniques and tools, marketers can move one step closer to reading the minds and hearts of customers. ◐

Chuck Bean is a partner at The Martec Group, a Chicago-based research firm. He can be reached at chuck.bean@martecgroup.com.

Breathing life into the data

The role of the journey map

| By James Rohde

snapshot

James Rohde takes a philosophical look at the strategies behind the creation of journey maps.

A customer journey map is a depiction of an individual's perspective of their relationship with a service, product or brand, over time and across channels. The purpose of creating a journey map is to quickly demonstrate the impact of specific interactions on a desired experience among a specific customer type.

So, in the end, journey mapping is a research-based solution that informs business strategy. But part of the problem with simple statements that include industry-specific words is that they are too easily thrown into irrelevant conversations that rob them of their meaning. While partially frustrating, this works to the favor of the industry because it forces these statements to either prove their universal worth or quickly show their limitations. We have seen a lot of this in the last few years with the growing constellation of research solutions – ethnographies, eye-tracking, neuro-based research, micro-surveys, and, recently, big data.

At the risk of joining the chorus of the blindly optimistic who turn up at each of these mini-revolutions, I think journey mapping is different. The difference is that journey mapping is more of a data structure that is intended to incorporate many different data components. It is a mechanism to breathe life into the raw data left behind by the consumer experience that is being explored. This gives journey maps the privilege of drawing their strength from the accuracy of their underlying methodologies.

Identify the consumer behavior

The easiest way to determine the experience to focus on is to identify the consumer behavior you are interested in supporting. The more specific you can be the more tactical the map. Some examples: converting more consumers to customers; converting customers to loyal advocates; increasing customer spend per transaction; increasing app downloads; and converting in-person customer service to mobile app servicing.
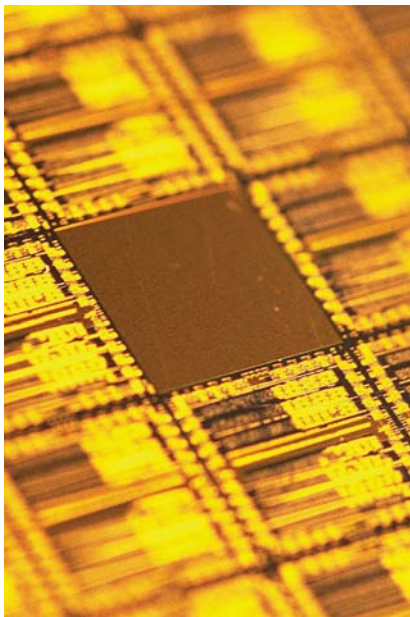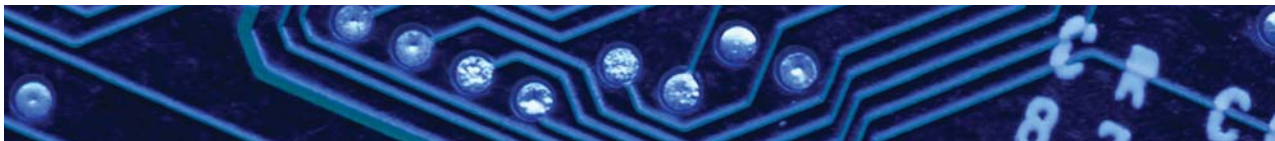
quirks.com/articles/2017/20171010.aspx

Just as we want to be specific with targeting a specific behavior, we want to be explicit with the persona or segment that we are interested in understanding. The end solution is meant to highlight the connections between brand interactions and impact; so, to make that accurate and actionable we must acknowledge that different segments of people will have different goals that drive their interactions with any one touchpoint. Often, the brand, product or service in question will have an existing segmentation in place that can be leveraged.

However, here there are some essential criteria of an actionable segmentation that must be covered to be useful for a journey map. If any one of these basics are missing, it is worth revising or updating the customer segmentation. Segmentation should be steady, show division and have substantial segment proportions.

Steady. Customer segmentation is not meant to be fluid. Segment classifications should enable you to accurately know something about the targeted consumer that is true for long enough that you can create and execute a brand strategy. Additionally, to know something about the consumer you must be able to identify them in the marketplace with a reasonable degree of accuracy.

Historically, this was the difference between an attitudinal and product-based segmentation. The attitudinal segmentation had longevity but was so impractical to leverage after the study that it became void of meaning. The product-based segmentation is easy to execute but was so void of insight that its functionality is often limited to short-term tactics.

Thankfully, there is no longer any reason to choose one over the other. Segmentations today are based on behaviors and attitudes. "Based" is the key word – this is not the same as profiling attitudes on top of a product segment. Nor is it the same as profiling behaviors on an attitudinal segmentation; for our segments to work for us, we need to ensure that we are identifying them along the parameters required to lever-

Figure 1
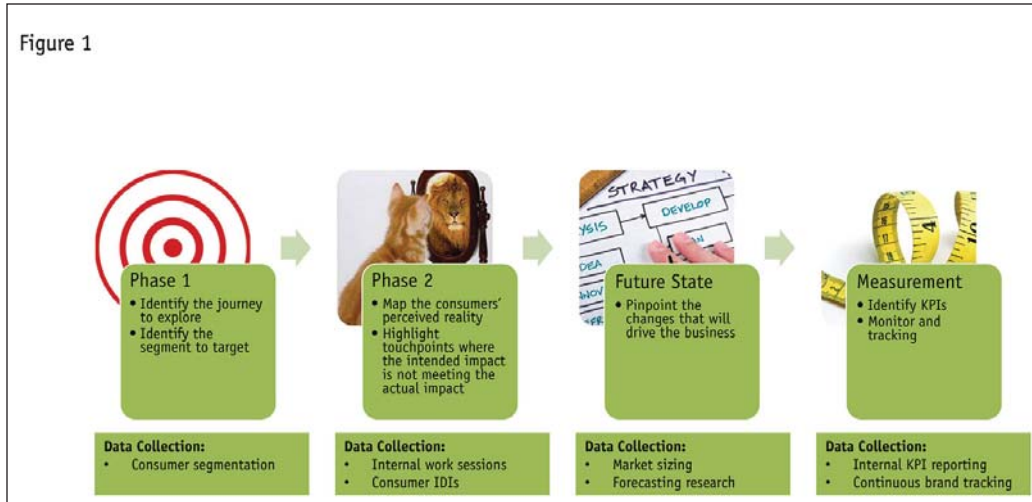
age their insight. Segments should be defined by the attitudes and behaviors that make them unique from the rest of the population.

Division. Segments need to be unique enough that they are clearly differentiated from each other in ways that are meaningful to the brand, identifiable in the market and uncover predictable attitudes and behaviors. This has become much easier over the past few years with the proliferation of big data. Much of the information that is worth noting has long been available but now that people are actively talking about these data sets, the ease of appending this information to segmentation study data has been a phenomenal evolution. This includes things like internal purchasing data and media consumption habits sourced from data brokers.

These additional data sets combine with attitude and self-reported behaviors to provide the type of robust data set that allows for clear segments to reveal themselves. Most importantly, the segments are revealed in ways that can be measured and defined by the consumers' attitudes and behaviors. This allows for unique segments that stand apart from each other in ways that are meaningful to the brand and identifiable in the market. As a result, insights are discovered that can be leveraged for strategic planning and segment IDs can be predicted in the market so that strategy can be executed.

Substantial segment proportions. When a segmentation data set is completed, analysts face an incredible temptation in micro-segments. These are segments that are differentiated in meaningful ways but represent too small a proportion of the market to be

strategically viable. The challenge is to find the ways that these micro-segments roll up to form a true segment. While each segmentation paradigm is unique to its objective, a relative sense of scale could show a dataset revealing hundreds of micro-segments that eventually roll up into eight or nine primary segments. These primary segments are what typically become useful to strategic planning.

Current state of the journey

Up to this point we have identified the consumer action we are interested in supporting. We know that we are mapping out the consumer interactions that surround this action in the context of the most recent segmentation paradigm. Mapping out the current state of the journey is the depiction of the interactions and their related impact. This is to represent what is currently taking place from the perspective of the consumer, which requires a couple steps of data collection to take place: internal work sessions; consumer IDIs by segment.

Internal work sessions. The purpose of the internal work sessions is to identify all the touchpoints that have been made available for consumers and define how consumers were intended use each touchpoint. We want to know how consumers were intended to experience the brand and what consumer action was expected after each interaction. It is probably becoming clear why the segmentation is so important since it is expected and probable that different segments are going have different needs associated with any one touchpoint.

As an example, think about all the reasons a person might visit a physical branch to do their banking. Now consid-

er how those reasons would be different based on that consumer's dependence on technology, travel habits, investment products or marital status.

Consumer IDIs by segment. These are deep-dive interviews designed to map out the consumer interactions up to the action we have posted as the end of the map. We are interested in pinpointing some specific data points during each interview, so organization and strong moderation is critical.

- **Stages of the journey (need-states)**: What is the consumer trying to do? What is motivating them to accomplish the task? What process are they going through to accomplish their task?
- **Tools the consumer is leveraging to accomplish the task**: technology; people; places; content or media.
- **Interaction experience**: thinking; feeling; doing.

The internal work sessions and consumer IDIs should inform the order of the need-states that lead to the final behavior being mapped. Additionally, these interviews will determine how the consumer can be described at each point in the process. This portion of the process yields the most compelling visuals.

Opportunity to improve the experience

The purpose of understanding the brand's relationship with a consumer group over an allotted experience is to quickly identify the interactions that roll up into the desired action you want to see replicated in the market. If the opportunity exists for increasing the desired action, then there is opportunity to improve the experience. This could take the form of fixing an experience that is dissatisfying to customers or changing an experience that is satisfying but not driving the intended behavior.

Regardless, once the current state has been mapped the next step is to identify where the most productive changes to the map should be. This requires some degree of forecasting that accounts for the reach and impact that your intended change will have on the audience.

Again, having a firm grasp on a recent segmentation is critical. Changes to an experience will impact different types of customers in different ways. Plus, the investment needed to change the experience will be taken into consideration with the size of the audience it is going to affect and the potential for gain available based on the intended impact. In short, is the effort to make the change going to impact enough people, who will spend more to make it worth the investment?

Measurement of KPIs

As with any strategic objective, measurement of KPIs is critical to monitor successful execution. In the short term, this helps keep the team on the right path. In the long term, this should call out when it is necessary to redirect efforts to a new tactic or strategy. Alongside the voluminous internal reporting, some form of continuous brand measurement is often used to determine how these strategies are moving forward. ●

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7 TOP SOCIAL MEDIA RESEARCH COMPANIES

Social media can be a valuable tool for marketing research, providing a way to study consumer opinions, thoughts and commentary. Social media plays a big role in consumers' everyday lives. Consumers are able to be more personal on social platforms, providing researchers with opinions, thoughts and comments that can give valuable insight. Social media sites provide a way for consumers to directly interact with brands and companies, showing firsthand how consumers feel about their products and services. Social profiles often include valuable information on a consumer's demographic, providing researchers with insight into the types of consumers using a company or brand's products and services. This information, along with the ability to see and study consumer opinions and comments on products and services, provides insights that can help brands and companies maximize their social media presence, improving brand strategy and image. Consider these social media research companies for your next research project.

Ann Michaels & Associates: Social Media Management

Founded 1998
Marianne Hynd, VP of Operations

What is your social media story? How does your company look online? Since 2007, Ann Michaels has been monitoring, marketing and researching social media for our clients. We save our customers time and money by optimizing their social platforms. Social media research is now a valuable tool to be included in any research study or project. By viewing an individual's social sites, you can really learn a lot about a person. They
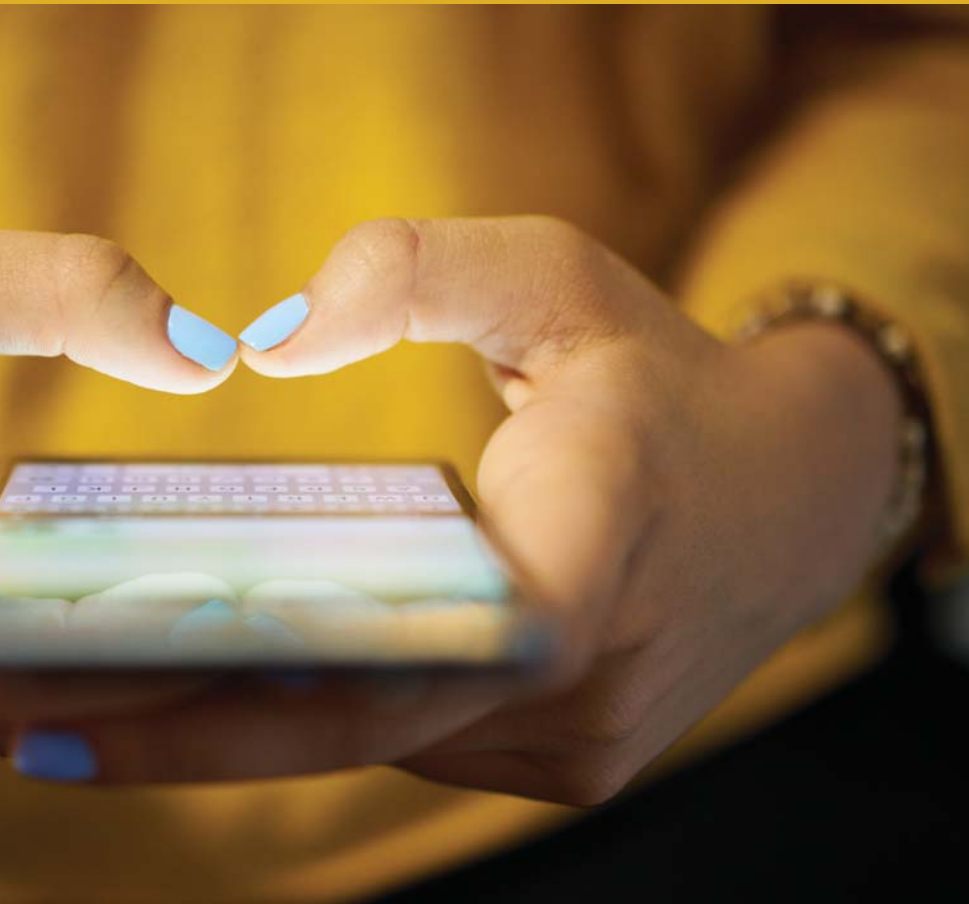
DigitalMR Ltd.

Founded 2010 | 15 employees
Michalis Michael, CEO

DigitalMR is a high-tech company with focus on market research and customer insights, with two proprietary solutions: listening247 (high precision social listening and analytics); and

are most genuine when not responding directly to a company and simply engaging with friends, family members and coworkers online. It is like one big online focus group.

Phone 866-703-8238
www.socialmediamanagement.net and
www.e-chatter.net

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Ascribe

Founded 1999 | 60 employees
Rick Kieser, CEO

Ascribe takes the time and trouble out of verbatim analysis for the world's top research firms and brands across 57 countries. Each year, Ascribe processes data from more than 100 million survey completes and analyzes more than 300 million open-ended customer

comments from across channels, including survey platforms, social media, Excel files and more, regardless of language. Balancing the precision of insight generation with automation, Ascribe's flexible, comprehensive SaaS-based technologies gather and instantaneously analyze customer or employee feedback to enable real-world problem solving and reveal valuable opportunities. To learn more or request a demo, please visit goascribe.com.

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communities247 (DIY private online communities). Our mission is to help companies make better, affordable products and services that in turn help improve people's quality of life. Our capabilities are a result of years of partially government funded R&D in text analytics for sentiment and topics analysis, emotion detection and scoring and cutting-edge automated image theme analysis using deep learning (the Magic Captioner). We work with blue-chip multinationals such as Diageo, SABMiller, Nielsen and more.

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goo.gl/5RZGrx

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Localspeak

Localspeak

Founded 2003
Candida McCollam, CEO

Localspeak is a multicultural social media intelligence firm, specializing in global social media intelligence and analytics – in 43 native languages. Leveraging the NetBase enterprise global social insights platform, Localspeak supports brand proactivity and global competitiveness, delivering mega- and micro-trend analytics. Using NLP (natural language processing), Localspeak delivers custom industry native-language social discovery and analytics – international competitive brand audits, campaign analysis, innovation insights, consumer behavior, emotion, sentiment and trend analysis. Tactical social analytics validate and refine marketing campaigns. Our native-language linguists and analysts enrich culturally authentic market social insights and data analysis, enhancing brand research and equity tracking outcomes.
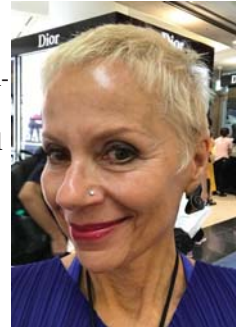
Phone 917-226-9845
www.localspeak.com

A Sister Company of

Discovery Research Group

Founded 1986 | 210 employees
Chauncy Bjork, Vice President of Analytics and Technology

Discovery Research Group has created a unique, leading-edge approach to social media research. Our proprietary platform brings in data from across the Web and transforms it into useful insights through text analysis models, machine

learning and curated information. DRG delivers a deeper understanding of customer opinions and market trends by tailoring the data collection and analysis to specific topics and conversations. This unique approach finds the right fit for both large and small organizations to better understand their position with customers and the market. In addition, our customized dashboards put all of that valuable information right at your fingertips!

Phone 800-678-3748
www.discoveryresearchgroup.com

SMRA – Social Media Research Association

Kathy Doering, President

The SMRA is a global trade association dedicated to the advocacy, promotion and development of best practices for using social media as a source for insights and marketing efficiency. Our purpose is to help marketing professionals understand how to use new and emerging social media technologies to reach B2B and B2C audiences so they can maximize their marketing efforts. We connect the dots between qualitative, quantitative and passive data by sharing data collection and analytic approaches using advanced technologies. The SMRA invites anyone with an interest in using social media research to improve their marketing effectiveness to join us.

Phone 630-303-9272
www.smra-global.org

SSI (Survey Sampling International)

Founded 1977
Chris Fanning, President and CEO

Celebrating 40 years in business, SSI is the premier global provider of data solutions and technology for consumer and business-to-business survey research. SSI reaches participants in 90+ sample countries via Internet, telephone, mobile/wireless and mixed-access offerings. SSI staff operates from 40 offices and remote staff in over 20 countries, offering sample, data collection, CATI, questionnaire design consultation, programming and hosting, online custom reporting and data processing. SSI's employees serve more than 3,500 customers worldwide.

Phone 203-567-7200
www.surveysampling.com

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10 TOP PRODUCT RESEARCH COMPANIES

With so many products available to consumers at any given time, how do you make your new or existing product stand out? The answer, in part, lies in marketing research. Research companies that specialize in product testing and product research have the tools and methods that can help your product or concept stand out against the competition and resonate with consumers. These research companies can help you successfully test and launch new products and concepts or improve and update existing ones, helping them to remain current on constantly-changing consumer opinions and tastes. These companies have the tools to test products in a variety of categories, whether it's sensory testing for fragrances, taste testing for food and beverages or provide attitude and usage studies to measure consumer perception. For your future product testing and product research needs, consider these companies.

B2B International

Founded 1998 | 120 employees
Julia Cupman, VP

B2B International is the largest B2B-focused market research firm, with offices across North America, Europe and Asia-Pacific. Our client portfolio includes 600 of the world's largest 1,500 companies. We have conducted 3,000+ B2B research studies spanning a

quirks.com/articles/2017/20171034.aspx

Complete Research Connection

Founded 2005 | 20+ employees
Chelle Precht, CEO/President

Complete Research Connection is not only a name; it is a statement of purpose. While we offer a full range of services, product testing (HUT/CLTs) is one of our specialties. CRC uses exacting standards to ensure recruiting is spot-on, quotas are monitored for exactness and data collection is managed to perfection. Our beautiful facility is newly-refreshed with five rooms of varying sizes and offers technology such as Revelation, virtual wall and eye-tracking, which can be used to enhance any project. We have a large kitchen able to be electrically wired to fit all types of commercial appliances.

Phone 614-220-4120
www.crcmr.com

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wide range of sectors from traditional heavy industry to financial and business services. From sole proprietors to corporates, from procurement to production, we know how to reach the right audiences and extract the intelligence you need. As B2B specialists, we provide the most comprehensive range of B2B research services to give your brand a competitive edge. This includes the most experienced business-to-business NPD research team that can help you identify new markets and/or products, test concepts and prototypes and track the launch.

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www.b2binternational.com

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and sensory science. We excel at exploring the consumer usage experience across the product's sensory elements to understand the emotional connections that reveal aspirations and true motivators for product purchases. With a portfolio of quantitative, qualitative, sensory and proprietary techniques, we work across the product innovation pipeline from concept development through commercialization. Our insights guide the innovation pipeline, discovering white-space opportunities and bringing clarity to current product development and marketing efforts. Together, we develop superior products and create engaging customer experiences. Let's talk about your innovation landscape.

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

Blueberry Marketing and Sensory Research

Founded 2001 | 30 employees
Kristen Robeson, Director, Qualitative
Lisa McGurk, Director, Quantitative

A full-service market research consultancy, Blueberry combines expertise in marketing research, product research

your market, consumer and business, and look at every innovation challenge with diverse and fresh perspectives. In addition to product optimization, we provide innovation positioning and commercial launch plan recommendations that will drive successful launch execution. Contact Pearl for help with your innovation challenge!

Phone 416-575-2246
www.pearl-strategy.ca

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RTi Research

Founded 1979 | 55 employees
David Rothstein, CEO

RTi boasts more than 30 years of product testing experience, supporting loads of successful product launches and, just as important, helping our clients avoid expensive missteps. In today's high-stakes and unforgiving marketplace, optimizing your product and ensuring it stays that way are paramount. Navigating the many nuances of product testing requires a partner with extensive knowledge and experience; a partner like RTi Research. We are an AMA Gold Top 50 company and a Connecticut Top Workplace. Clients come to RTi seeking higher-level involvement, more insightful thinking and extraordinarily attentive service; they stay because we deliver – we support their success.

Phone 203-324-2420
www.rtiresearch.com

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SIS International Research

Founded 1984 | 75 employees
Ruth Stanat, CEO

SIS International Research is a global market research and strategic market intelligence company providing full-service qualitative and quantitative research, fieldwork, data collection and strategy research. Our research solutions include product testing, new product development research, in-home usage tests (IHUTs), concept testing, usability research, pricing research, design research and surveys. Our services include recruitment, project management, fieldwork, data collection, interviewing, analysis and reporting. Uniquely, SIS has a strategy research unit providing market sizing, market opportunity and entry strategy, benchmarking and competitive intelligence. SIS also conducts full-service qualitative and quantitative research nationwide and worldwide. Our headquarters and focus group facility are located in New York, and our other key regional offices include London, Shanghai and Manila.

Phone 212-505-6805
www.sismarketresearch.com

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SSI (Survey Sampling International)

Founded 1977
Chris Fanning, President and CEO

Celebrating 40 years in business, SSI is the premier global provider of data solutions and technology for consumer and business-to-business survey research. SSI reaches participants in 90+ sample countries via Internet, telephone, mobile/wireless and mixed-access offerings. SSI staff operates from 40 offices and remote staff in over 20 countries, offering sample, data collection, CATI, questionnaire design consultation, programming and hosting, online custom reporting and data processing. SSI's employees serve more than 3,500 customers worldwide.

Phone 203-567-7200
www.surveysampling.com

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www.quirks.com

Names of Note

Communications agency *LEWIS* has appointed **Kaitlyn McAuliffe** as senior research manager, based in Washington, D.C.

Seattle-based researcher *Discuss.io* has added two new hires for its U.S. sales team: **RJ Scott** as senior research solutions executive and **Zuzana Žilková** as senior account manager.

Restaurant chain *Sonic Corp.*, Oklahoma City, has appointed **Jose A. Dueñas** as executive vice president and chief brand officer.

Spain-based researcher *Netquest* has appointed **Johnny Caldwell** as managing director of the newly-formed Netquest UK.

Dentsu Aegis Network, London, has appointed **Nick Brien** as CEO Americas and CEO U.S., based out of New York. Additionally, **Nigel Morris** has been appointed as chief strategy and innovation officer, based out of London.

Cornish College of the Arts, Seattle, has appointed **Christine Bateman** as vice president of marketing.

Complete Research Connection in Columbus, Ohio, has added **Carrie Robinson** as a project assistant to support the client services/project management team.

Retail consumer insights firm *SPINS*, Chicago, has appointed **Brian Gillis** as executive vice president, retail.

The *Research Association New Zealand* has named **Horst Feldhaeuser**, group client director at research software and services firm *Infotools*, as a fellow for the organization.

Feldhaeuser

Hillary Kuenn has joined Scottsdale, Ariz., customer experience and employee engagement firm *Satrix Solutions* as senior client experience analyst.

Insight consultancy *Firefish* has appointed **Eric Paice** as a director in its U.S. office, based in Brooklyn, N.Y.

Paice

U.K. video insights firm *LivingLens* has added two new hires to its sales and marketing team: **Sophie Goddard** as business development director and **Kat Hounsell** as marketing director.

Nuremberg, Germany, researcher *GfK* has appointed **Christoph Erbenich** as chief marketing and innovation officer. Additionally, **Gerhard Hausruckinger**, a member of the management board responsible for the consumer choices sector, has resigned from the company. GfK has appointed **Jutta Suchanek** as chief HR officer and **Benjamin Jones** as chief technology officer. And **Alessandra Cama** has resigned from her office as a member of GfK's management board, responsible for the operations sector.

GateHouse Media, Pittsford, N.Y., has named **Denise Robbins** as senior vice president, consumer marketing.

Lehi, Utah, researcher *MaritzCX* has appointed **Charlotte Blank** as chief behavioral officer and formed the Maritz Field Research Collaborative.

U.K. video analytics firm *Big Sofa* has appointed **Ralph Kugler**, former director at Unilever, and **Simon Chadwick**, currently managing partner at *Cambiar*, as strategic advisers to its board.

Warren, N.J.-based researcher *Lightspeed* has promoted **Jennifer Carrea** to CEO Americas and global health. Former CEO Americas **David Shanker** is leaving the company to pursue new opportunities. **Christine Clark** has joined as senior vice president, Americas sales.

Carrea

Retail consumer insights firm *SPINS*, Chicago, has appointed **Peter V.S. Bond** as vice president of consumer activation.

Port Washington, N.Y., information company *The NPD Group* has named **Tia Frapolli** as president for its Office Supplies business.

Pravin Shekar, chairman and CEO of *Krea eKnowledge*, has been elected as the president of the *Market Research Society of India*, while **Raj Sharma**, chairman of MRSS India, has been re-nominated as the managing committee member and spokesperson.

The *Global Retail Marketing Association*, Treasure Island, Fla., has named **Timothy Rea**, current principal, CMO at *Edward*

Jones, as chairperson of its advisory board for financial and insurance services.

■ *MFour Mobile Research*, Irvine, Calif., has hired **Lily Igrassia** and **Abraham Graciano** as client service staffers and **Shireen El-Maissi** as a recruiter. **Mike Gaffney** has joined as chief revenue officer. The firm also added **Alice Lu**, who will focus on survey programming and data delivery; **Gennadiy Kofman** as senior software engineer; **Katherine Haldane** as a software engineer; and **Brandon Fletcher** and **Matthew Xa** as software programmers and data experts.

■ Digital research marketplace *Collaborata*, Chicago, has named **Jeffrey Resnick**, managing partner at Stakeholder Advisory Services, and **Tim Hoskins**, president of Quester, as strategic advisors to its board of directors.

Resnick

Hoskins

■ Canada-based customer intelligence platform *Vision Critical* has hired **Marco Bussadori** as chief revenue officer for North America.

■ Moore, Okla., marketing agency *Freestyle Creative* has promoted **Matt Farley** to vice president, director of marketing.

■ *INGATHER Research & Sensory*, Denver, has appointed **Maura Nunez** as senior research director, a newly-created position, and **Phil Odell** as director of marketing. The firm also added two new members to its executive management team: **Chaz Clay** as director of operations and sensory research and **Danielle Feagin** as manager of operations information systems.

■ San Diego research firm *Integrated Marketing Systems* has promoted **Nick Benore** to president following the retirement of former President **Rinda Robbins**.

■ Redwood City, Calif., software company *People Power* has named former Parks Associates President **Stuart Sikes** as vice president of business development and strategy.

■ Health marketing and commercialization agency *Klick Health*, Toronto, has expanded its behavioral science team by adding **Tim Fisher** as VP brand strategy and innovation and **Adam Palanica** as a behavioral scientist.

■ Brisbane, Calif., customer relationship operations company *Pramata* has hired **Craig Doud** as chief operating officer.

■ Philadelphia-based researcher *Focus Pointe Global* has appointed **Penny Trenter** as director, emerging business. She is based in St. Louis.

Trenter

■ Needham, Mass., marketing intelligence software firm *Visual IQ* has appointed **Theresa Colarusso** as senior vice president, customer success.

■ Research company *Mozaic Group* has appointed **Barbara Carpenter** as research director and has promoted **Kathryn Winland** to senior vice president.

■ The *Parkland Center for Clinical Innovation*, a Dallas-based health care intelligence organization, has appointed **Vikas Chowdhry** as VP, data science.

■ The *Mobile Marketing Association*, New York, has appointed **Sanjay Gupta** – executive vice president of marketing, innovation and corporate relations at Allstate Insurance Company – as chairman of its global board of directors. Gupta replaces outgoing chairman **John Costello**.

■ Santa Monica, Calif., streaming service *Hulu* has appointed **Kelly Campbell** as CMO.

■ **Dave Cameron** has joined Chicago-based strategic marketing firm *Target Data* as vice president of analytics.

■ Newton, Mass., research software firm *MarketSight* has added the following new hires to its U.S. team: **Rob Calcagni** as vice president of sales; **Amy Saint-Onge** as senior designer; **Marcus Woodard** as marketing manager; and **Cassie Packer** as marketing assistant.

■ Professional services firm *KPMG Australia* has appointed **Lisa Bora** to lead sales transformation for its customer, brand and marketing advisory business.

■ Measurement company *comScore* has appointed three new members based in its Sydney office: **Adam Natiq** as head of sales, Australia and New Zealand; **Alan Jenner** as senior product manager, Asia-Pacific; and **Derek Wen**, client services manager, Asia-Pacific.

■ *Maritz Motivation Solutions*, St. Louis, has appointed **Drew Carter** as president.

Sollecito

■ **John Sollecito** has been named executive vice president and team leader of media and entertainment for *GfK* in North America. He will be based in the company's New York City office.

■ *ABC*, New York, has promoted **Rebecca Daugherty** to executive vice president, marketing. Daugherty will lead the marketing departments of ABC Entertainment and ABC Studios. Additionally, **Erin Weir** has been promoted to senior vice president, marketing strategy, ABC Entertainment, and **Jill Gershman** has been promoted to senior vice president, marketing creative, ABC Entertainment.

■ The *Interactive Advertising Bureau*, New York, has named **Craig Coleman** as vice president of marketing.

■ In Chicago, customer data science company *dunnhumby* has appointed **Jose Gomes** as managing director of North America.

■ Hong Kong-based research company *ABN Impact* has appointed **Miranda**

Cheung as its director in Singapore.

■ Chicago-based retail intelligence firm *SPINS* has appointed **Patrick Kelly** as senior vice president of customer solutions and **AJ Rivera** as principal of global enterprise sales.

■ *AT&T Inc.*, Dallas, has named **Brian Lesser** as CEO of its advertising and analytics business.

■ In London, *Research Now* has hired **Floriane Locatelli** as business development director, a new role created by the company to serve management consultancies, private equity firms, hedge funds and banks.

■ *Burke, Inc.*, Cincinnati, has appointed **Thania Farrar** as vice president, client services manager and **Corey Beilstein** as vice president, research innovation.

■ *Adelphi Research Global*, Doylestown, Pa., has hired **Clarissa Guengant** as vice president of client services for the West Coast. She is located in San Francisco. Additionally, project Team Leads and Directors **Lauren Carroll**, **Carly Gibbons** and **Carmen Michaylira** have been promoted to senior directors, while **Kelliann Rooney** has been promoted to associate director. **Nick Chiarello**, **Meghan Keane**, **Billy Ripley** and **Pooja Soni** have joined the company as project associates.

■ In the U.K., market and customer insights firm *MARU Group* has promoted **Sarah Redford** to chief people officer and **Carlos Palacio** to chief information officer. Both will join the group global executive committee.

■ U.K.-based consumer insight company *Join the Dots* has appointed the following to strengthen its client services team: **Tracey Hunter** as senior client director and **Martin Bryant** as client director.

■ Research solutions firm *Confirmit*, based in Oslo, Norway, has appointed **Jason Mallia** as country manager to oversee operations in Australia and New Zealand.

■ **Bernardo Rodriguez** has been named to the newly-created position of chief digital officer for Costa Mesa, Calif., researcher *J.D. Power*.

■ Glen Mills, Pa., research firm *SSRS* has appointed **Samantha Daugherty** as vice president of telephone data collection services.

■ Information and health care service firm *QuintilesIMS*, Danbury Conn., has appointed **Colleen Goggins** to its board of directors.

■ Customer insights agency *SKIM Singapore* has added **Lester Sualog** as client solutions director, Asia and **Paul Janssen** as vice president.

Sualog

■ Stamford, Conn., research technology firm *FocusVision* has promoted **Zlatko Vucetic** to president of the company. Vucetic will replace outgoing CEO **Jamin Brazil**, who has resigned to pursue other opportunities.

Janssen

■ Southampton, Pa., medical research firm *MedSurvey* has appointed **Paul Golota** as CEO.

■ In Singapore, information services company *Experian* has promoted **Mohan Jayaraman** to regional managing director Asia-Pacific for decisions analytics, business information services and data.

■ Marketing technology firm *Tapad*, New York, has appointed **Todd Benedict** as chief revenue officer for North America.

■ Canada-based researcher *Maru/Matchbox* has promoted **Derek Matisz** to senior vice president, platform operations. The company has also announced the departure of Chief Process Officer **Leigh Frost**.

■ Customer insights agency *SKIM* has appointed **Fred Church** as health care team director, based in the Hoboken, N.J., office.

■ The *Advertising Research Foundation*, New York, has named **Paul Donato** as chief research officer.

Donato

■ Red Bank, N.J., omnichannel data firm *V12 Data* has promoted **Jeff Johnson** to senior vice president of client development.

■ **Sameer Chopra** has joined the management team of San Diego consumer risk management firm *ID Analytics* as chief analytics and science officer.

■ Dublin-based e-commerce intelligence firm *Clavis Insight* has announced plans to expand its Asia-Pacific team to 45 people within the next 12 months. The expansion will include roles in sales, marketing, professional services and operations.

■ **Haley Kaiser** has joined research company *Smarty Pants* as an insights whiz. She is based in Tampa, Fla.

■ Eden Prairie, Minn., direct marketing agency *SeQuel Response* has hired **Terry Peters** as marketing research director.

■ *MarketVision Research*, Cincinnati, has appointed **Benjamin Bruggemann**, **Abby Bentson** and **Sarah Moore** as research assistants in client services, while **Allyson Sovinsky** has been appointed as a research assistant in qualitative. Additionally, the following team members have been promoted: **Alex Smallen** to research director; **Lisa Waxler** to senior research manager; and **Chris Neal**, **Carl Murphy** and **Courtney Brackin** each to senior research associate.

■ *National Western Life Insurance Company*, Austin, Texas, has appointed **R. Bruce Wallace** as senior vice president and CMO of its domestic insurance operations.

Research Industry News

News notes

■ **The Insights Association**, Washington, D.C., has filed comments with the Federal Communications Commission (FCC) in response to its proposals to combat robocalls. In its comments, the association endorses the use of a white list for legitimate dialers (like researchers) to avoid being blocked by call-blocking services as well as proposing a slight change to the FCC's definition of illegal robocall, which the association says is overly broad. The association also commented on the FCC's release of complaint data for call-blocking efforts, which it believes would do more to disrupt legitimate dialing than to combat illegal robocalls.

■ Warren, N.J., researcher **Lightspeed** has been granted a patent by the U.S. Patent and Trademark Office for its Honesty Detector solution, which analyzes responses to a combination of statements and calibration benchmarks, removing respondents from studies who say yes to nearly everything being asked in order to qualify for surveys.

■ Cincinnati-based researcher **Burke, Inc.** has attained the ISO 27001 certification for information security. ISO 27001 provides companies with a framework, requirements and controls

to protect information assets. The certification was awarded by CIRQ, a subsidiary of the Insights Association, in collaboration with the Professional Evaluation and Certification Board.

■ **Action Based Research**, headquartered in Ohio, celebrated its 20-year anniversary on Aug. 1.

■ **Circle Research**, London, has launched its 2018 scholarship program, which is open for applications until June 1, 2018. The winner will receive a £1,000 contribution to their fees.

■ Palm Beach Gardens, Fla., qualitative research firm **The Candor Company** has announced plans to phase out focus group facility work and instead focus on meeting research participants using methodologies like ethnography, in-home dinner parties and mobile diaries.

■ **CIRQ**, a subsidiary of the Insights Association, has awarded certification to Fairfax, Va., consulting and technology services firm **ICF** for compliance to the ISO 20252 standard for market, opinion and social research. ISO 20252 establishes globally-recognized terms, definitions and service requirements for project management in research organizations.

Acquisitions/transactions

■ **Apple**, Cupertino, Calif., has acquired Germany-based eye-tracking solutions firm **SensoMotoric Instruments**.

■ Columbia, Md., marketing agency **Merkle** has acquired U.K. data analytics company **Aquila Insight**. The company will be branded Merkle|Aquila and will become part of Merkle's European operation, led by Tim Berry, president of Merkle Europe. Aquila's staff will join the Merkle team and John Brodie and Warwick Beresford-Jones, Aquila's joint CEOs and co-founders, will remain

at the helm of the leadership team.

■ In the U.K., market and customer insights firm **MARU Group** has acquired **SynGro**, a customer experience technology company, for an undisclosed sum. SynGro will rebrand as Maru/SynGro and its management team will remain with the company to oversee its development and integration into MARU Group's technology platform.

■ **Market Track**, a Chicago-based business intelligence solutions firm and a newly-acquired portfolio company of **Vista Equity Partners**, has joined forces with San Francisco-based consumer insights firm **InfoScout**. The cash and stock purchase of InfoScout by Market Track allows for the linking of omnichannel marketing and pricing activity to actual sales results. Following closing, InfoScout will maintain its name, its employees, its headquarters in San Francisco and Jared Schrieber will continue as its CEO.

■ London-based digital communications group **Next 15** has acquired **Circle Research Limited**, also based in London, through its data and insights subsidiary MIG Global Limited for £5.21 million. Circle Research Founders Andrew Dalglish and Beth Pearson will remain as joint managing directors, while Founder David Willan will relinquish his role as chairman but continue to support the business in an advisory capacity. Next 15 has also recently acquired B2B digital agency Velocity Partners Limited.

■ Singapore-based retail technology firm **Trax** has acquired **Nielsen**'s Store Observation (NSO) project-based services in the U.S. market. NSO provides in-store research for manufacturers, retailers and distributors. Trax will assume responsibility and ownership for delivering NSO to existing customers.

■ Toronto-based market research and data analysis firm **ValidateIT**

Technologies Inc. has been acquired by **Victoria Pelletier**, who has taken control of the firm as CEO. Original Founder Corrine Sandler will partner with Pelletier through the transition in the months ahead.

■ U.K. health care and strategic marketing firm **Cello Group** has acquired Princeton, N.J., biopharmaceuticals insights consultancy **Advantage Healthcare**.

■ Professional services company **Accenture**, New York, has acquired Austin, Texas, digital optimization company **Clearhead** to strengthen the personalization services of Accenture Interactive. Terms of the deal were not disclosed.

■ New York research company **Advanced Focus** has acquired **Marketview Research**, located in Danbury, Conn. The acquisition adds a two-room focus group facility to Advanced Focus's other offerings which include a traditional focus group facility and non-traditional creative loft space in New York City, as well as a facility in Tarrytown, N.Y.

■ India-based researcher **MRSS India** has acquired Singapore-based research company **Market Probe Asia Pacific** from its U.S. parent Market Probe Inc. in an all-cash deal.

■ New York-based social intelligence platform **Synthesio** has acquired **Social Karma**, a Brussels-based audience insights firm. Social Karma's solution will combine Synthesio's social data to provide the capabilities to build audience personas, provide audience insights and offer owned-channel analysis to Synthesio's users.

■ Columbia, Md., marketing agency **Merkle** has acquired India-based marketing and analytics agency **Sokrati**. The company will be branded Merkle|Sokrati and Sokrati's staff will join the Merkle team. Anubhav Sonthalia will serve as CEO of the new company and will become part of the Dentsu Aegis Network leadership team in India along with Sokrati co-founders Ashish Mehta, CEO, and Santosh Kumar Gannavarapu, head of innovations.

■ In the U.K., professional services firm **PwC** has acquired **Optimisa Research**, expanding the capacity of its existing research to insight consulting business. The merged teams will become PwC Research and will provide insight to local, national and international businesses.

■ **Nielsen**, New York, has acquired **vBrand**, an Israel-based technology start-up that developed a machine learning-enabled platform to measure brand exposure and impact in sports programming. VBrand and its technology will be fully integrated into Nielsen Sports.

■ Boca Raton, Fla., mobile marketing services firm **3Cinteractive** has acquired the **Prime Message** mobile marketing business unit from Scottsdale, Ariz., mobile enterprise solutions company **CellTrust Corporation**. The acquisition will give CellTrust mobile marketing messaging clients access to 3C's Switchblade platform.

■ Syracuse, N.Y., research firm **KS&R Inc.** has acquired health care insights firm **Delta Marketing Dynamics** to broaden its experience and resources in the health care industry.

■ New York-based communications company **Grey Group** has acquired a majority stake in **hug digital**, a digital marketing agency based in Dubai, UAE.

■ Los Angeles-based research services firm **MarketCast** has acquired Indianapolis-based social insights and analytics company **Fizziology**.

■ San Jose, Calif., mystery shop provider **Jancyn Evaluation Shops** has acquired **Customer Perspectives**, a mystery shopping company based in Hooksett, N.H.

Alliances/strategic partnerships

■ Sydney-based data and insights company **Pureprofile Limited** has formed a partnership with **Branded Research Inc.** The partnership allows Pureprofile to upgrade the Branded panel of consumer research profiles in the U.S., U.K. and Canada, increasing Pureprofile's offering in the U.S. and U.K. markets within programmatic media, digital publishing and market research.

■ **Prosper Insights & Analytics**, Worthington, Ohio, and economic research and consulting firm **e-forecasting.com** have joined forces to create the New Consumer Confidence Indices (NCI), an anticipatory macro-economic indicator and predictive analytic that uses Prosper's data sets on sentiment and mood to show inflection points in business cycles.

■ Consumer insights firm **Toluna**, Wilton, Conn., has formed a strategic partnership with health care-focused digital platform **Treato**, providing Toluna with access to Treato users for survey research.

■ Los Angeles nonprofit organization **Women in Research** has formed an alliance with the London-based **Market Research Society**. With the partnership, the two groups will co-produce and promote events and share resources for professionals in the industry.

■ New York-based data and technology firm **PlaceIQ** and Chicago-based researcher **IRI** have expanded their alliance. PlaceIQ's location-based insights will be integrated into the new IRI Personalization Suite to provide market-level insights into the customer journey based on location data.

■ Stamford, Conn., digital media intelligence company **Tru Optik** has formed a partnership with New York-based data management platform **Lotame**, allowing advertisers and publishers to access Lotame's first-party data and audience segments to create targeted over-the-top and CTV campaigns. Lotame's audience segments are available through Tru Optik's OTT Marketing Cloud.

■ U.K. video insight platform **Voxpopme** has formed a partnership with London-based researcher **Kantar**. Through the partnership, Kantar can integrate short video responses and interactions from consumer surveys, use Voxpopme's communities to capture feedback and make use of video from qualitative groups, interviews and ethnographic research. Kantar will also benefit from Voxpopme's collaboration with Affectiva, providing facial coding to detect engagement levels and emotional states of respondents in video responses.

■ **System1 Research**, London, has signed a multi-year Decipher license with research technology company **FocusVision**. Decipher, FocusVision's online survey software and reporting solution, will be rolled out by System1 as its programming system to its employees in offices in the U.K., the U.S., Switzerland, Germany, the Netherlands, France, Brazil, Singapore, Australia and China.

■ **Nielsen**, New York, has collaborated with Chinese e-commerce company **JD.com** to launch a multi-touch attribution offering in China, allowing marketers to understand and assess the sales impact of advertising and marketing investments across media platforms. The companies will jointly market the offering to help marketers better determine the effectiveness and return on investment of ads both in and outside of JD.com.

■ Wellesley Hills, Mass., technology company **RedPoint Global** has formed a strategic partnership with Canada-based **Bond Brand Loyalty** to maximize loyalty engagement efforts with a complete view of customers across all channels for loyalty programs and campaigns. Bond Brand Loyalty's Synapze Platform will leverage the RedPoint Customer Engagement Hub to expand its existing personalization and omnichannel capabilities and better support customer engagement.

■ **Nielsen**, New York, and grocery retailer **Aldi** have formed a multi-year relationship for integrated analytics data around shopper panel, custom retail analytics and advertising effectiveness. Nielsen will be Aldi's preferred data and analytics provider and cover nearly 1,700 stores in 35 states across the U.S.

■ In London, research company **GfK** has partnered with financial management service **Money Dashboard** to introduce GfK Consumer Wallet in the U.K., providing retailers and brands with insights into consumer spending patterns by category. Consumer Wallet clients will receive online access to data allowing them to analyze consumer spend by demographics and geographical region. The data sample is de-identified by Money Dashboard before it is shared with GfK.

■ New York research firm **BuzzBack** and San Francisco-based machine learning platform **GlimpzIt** have formed a partnership. The companies have collaborated to develop a proprietary approach to idea screening and eliciting user-generated content, with applications in-store, in-home and other consumer experiences.

■ Portsmouth, N.H., research company **Opinions 4 Good** (Op4G) has formed a three-year partnership worth $100,000 with Stamford, Conn., research technology firm **FocusVision**. Op4G, which currently uses the Kinesis platform for programming, will use FocusVision's FV Decipher insight platform as its primary survey platform.

Association/organization news

■ **The ESOMAR Foundation**, in cooperation with Los Angeles-based nonprofit **Women in Research** and **Unilever**, has funded the Marketing and Social Research Association's Kenyan Scholarship initiative. The scholarship has been given to Innocent Rwamba Nyaga, who will be pursuing a Master of Science in marketing with a focus on market research at the University of Nairobi School of Business.

■ **The Insights Association**, Washington, D.C., has formed an international chapter for member companies and individual members operating outside of the U.S. It's the association's 12th chapter and the first outside the U.S. The Insights Association has proposed that members of the Alliance of International Market Research Institutes (AIMRI) join the new chapter, which AIMRI members voted in favor of.

Awards/rankings

■ **Jay Ruparel** of Piscataway, N.J., research solutions firm **Azure Knowledge Corporation** has been named Entrepreneur of the Year 2017 at **Ernst & Young**'s Regional Awards gala. The awards program recognizes entrepreneurs who excel in areas like innovation, financial performance and personal commitment to their businesses and communities. Ruparel was selected as a winner in the Services category by a panel of independent judges.

■ **Felipe Korzenny**, professor emeritus of **Advertising and Integrated Marketing Communication** and founder and director emeritus of the Center for Hispanic Marketing Communication at Florida State University, has been inducted into the **Association of Hispanic Advertising Agencies**' Hall of Fame.

■ France-based research company **Strategir** has been awarded first prize in the research category of the **French Marketing Awards** for a joint study

with Switzerland-based fragrance and flavor company Firmenich. The research approach gave Firmenich higher predictability for sniff tests by using virtual reality.

■ Media company **TMC** has named Confirmit Horizons from Oslo, Norway, researcher **Confirmit** as a recipient of the 2017 CRM Excellence Award, presented by CUSTOMER magazine.

■ London-based **Circle Research** has named Ben Gallagher as the winner of the inaugural Circle Research Scholarship. Gallagher will receive £1,000 in funding. The scholarship was open to individuals entering their first year of undergraduate or who taught post-graduate study in a field related to marketing.

New accounts/projects

■ Burbank, Calif., firm **ThinkNow Research** has become the executive founding sponsor of the *Journal of Cultural Marketing Strategy*, a bi-annual publication dedicated to cultural marketing strategy in the U.S. and abroad.

■ **NOM** (Nationaal Onderzoek Multimedia), a joint industry committee responsible for a national readership survey in The Netherlands, has commissioned Nuremberg, Germany, researcher **GfK** to integrate its print (newspaper and magazine) brand consumption data with its online published media brand consumption data. The integration will produce figures for total readership, including consumption of brands across all platforms (print, PC/laptop, tablet, smartphone).

■ **Tampa International Airport** has contracted with Tampa, Fla., firm **Study Hall Research** for a series of qualitative Baccalaureate Groups to explore parking behaviors and practices.

■ Chicago-based researcher **IRI** has reached a long-term agreement with supermarket chain **Southeastern**

Grocers to leverage analytics to better serve its existing customers and attract new shoppers.

■ **Nielsen**, New York, and media company Turner have formed an agreement where **CNN** and **Turner Sports** will subscribe to Nielsen's national out-of-home reporting service. The agreement provides program and commercial ratings for live plus seven days of time-shifted viewing.

■ **The Hershey Company** has selected Chicago-based researcher **IRI** as its preferred market insights and analytics provider. Hershey will use the IRI Liquid Data technology platform to better understand retail performance, partner with customers and build long-term relationships for enhanced sales.

■ In New York, **ABC Network** has subscribed to **Nielsen**'s National Out-of-Home Reporting Service, providing ABC with out-of-home viewing data, including ratings for all content (programs and commercials) aired on the network for live plus seven days.

New companies/new divisions/relocations/expansions

■ Berkeley, Calif., artificial intelligence and machine learning company **MachineVantage** has launched with financing from Chicago-based researcher IRI and Unilever Ventures. Founded in 2016 by A. K. Pradeep, MachineVantage uses artificial intelligence algorithms and machine learning techniques to provide product innovations, brand semiotics, creative inspirations and digital and retail point-of-sale messaging.

■ U.K. research agency **Join the Dots** has launched **Spirit**, a dedicated qualitative research unit that specializes in multi-method projects. The new brand aims to help clients better understand consumers through a combination of mobile, ethno, communities, co-creation, groups, depths, accompanied shops, user testing and more. Spirit

will operate from the firm's main office in Manchester and will also service the Singapore office and all multinational clients.

■ Digital agency **Wunderman**, New York, has launched **Wunderman AI Services**, a new division for developing and deploying artificial intelligence solutions for marketers across customer care, acquisition, product development and customer retention. Wunderman AI Services will be powered by Microsoft Azure and uses the Cortana Intelligence Suite.

■ **Microsoft**, Redmond, Wash., has announced **Microsoft Research AI**, a research and incubation hub within its research organization that the company says will focus on addressing challenges in artificial intelligence and integrating things like machine learning, perception and natural language processing to develop tools and understandings to help with complex tasks.

■ San Jose, Calif.-based analytics software company **FICO** has opened an office in Miami to serve Latin American and Caribbean clients. The team in the Florida office includes Marisa Arribas, head of marketing for Latin America, and Martin Perez, head of professional services for Latin America.

■ Brisbane, Australia, behavioral advertising company **YomConnect** has launched in the U.S. with an office in Los Angeles.

■ San Jose, Calif., research firm **infoAnalytica** has launched **Act Healthcare Solutions**, a new division for its health care and life sciences services.

■ **Competitive Edge Research**, headquartered in San Diego, has opened a 63-station call center in El Paso, Texas.

■ London-based researcher **Verve** has launched a dedicated innovation practice that the company says aims to become the research partner of choice for customer-driven innovation.

■ Stockholm-based software company **Cint** has opened an office in Chicago and has added Joseph Jordan as SVP of supply.

■ Customer insights agency **SKIM**, based in the Netherlands, has opened an office in Gothenburg, Sweden, on the campus of Chalmers University of Technology. The new office will serve clients in consumer products, technology and the automotive industry. Stefan Svensson will serve as new venture lead, SKIM Sweden.

■ Encino, Calif., researcher **Innovate** has opened an office in London and has appointed Brendan Russell as sales director for the EMEA region. The company says it plans to make additional hires in the region to help service its portfolio of European-based clients.

■ **Insight Loft**, a new focus group facility, has opened in New Rochelle, N.Y. The facility includes live video-streaming, digital video recording, usability labs, eye-tracking and biometrics capabilities and more. Meredith Falvo has been appointed as facility manager for Insight Loft.

■ **MFour Mobile Research**, Irvine, Calif., has expanded its office to accommodate its growing team, increasing its floor space from 14,000 to 22,000 square feet. In September, the company opened its first satellite branch, an office in Scottsdale, Ariz., where 25 additional employees focus on software development.

■ Health care research firm **M3 USA**, Fort Washington, Pa., has launched its Integrated Solutions division, which leverages the firm's physician panel and digital assets to provide marketing and educational solutions for the pharmaceutical industry, device companies and other health care corporations.

■ Customer management firm **Convergys Corporation** has opened a new contact center in Colombia. The facility will house 1,000 new employees by mid 2018 who will provide service in English, Spanish, French, Italian and German to customers in the retail and health care industries.

■ Atlanta-based researcher **Geo Strategy Partners** has opened an office in Managua, Nicaragua, to expand its B2B/industrial research and growth strategy capabilities and reach.

■ **Q Research Solutions**, based in Old Bridge, N.J., and Redwood Shores, Calif., sensory evaluation firm **Tragon Corporation** have merged to form a sensory and consumer research supplier, which will initially trade as QRS-Tragon. The merger includes RedJade, a proprietary Web-based application and reporting tool for sensory analytics measurement. David Japhet, former CEO of Q Research Solutions, will act as CEO of QRS-Tragon, while Douglas Vort, former CEO of Tragon Corporation, will be president of RedJade Software Solutions.

■ Survey and data insights platform **SurveyGizmo**, based in Boulder, Colo., has announced a new Canadian division. The company will utilize Amazon's data center in Montreal to provide service that is fully compliant with Canadian data and privacy laws.

■ **Nielsen**, New York, has launched **Nielsen Esports**, a new business vertical focused on competitive gaming that will provide sponsorship valuation, fan insights, custom industry research and consulting services to rights holders, media platforms and brands.

■ **Food Affairs**, a Norwalk, Conn., research company focused on foodies, has been launched by consumer researchers Shelley Forrester and Hal Hauser. The company aims to bring insight to food and beverage marketers, food retailers and the travel and tourism industry to help expand their brands and businesses with foodies.

Research company earnings/ financial news

■ U.K. firm **DJS Research** has achieved 11 percent growth in annual turnover to £4.7 million for 2016/17, compared to £4.2 million for 2015/16.

■ Tampa, Fla., firm **Study Hall Research** reports that for the first six months of the year, it increased its revenue by 32.5 percent over the same period in 2016.

■ Market research language and translation service firm **GlobaLexicon**, London, reported that it achieved its fourth consecutive year of over 50 percent revenue growth.

■ Paris-based researcher **Ipsos** reported revenue of €833.8 million for the first half of 2017, compared to €833.6 million in the first half of 2016.

■ **Nielsen**, New York, reported revenues of approximately $1.64 billion for the second quarter of 2017, up 3 percent compared to the second quarter of 2016.

■ London-based communications group **WPP** made a strategic investment in Within Unlimited Inc., a Los Angeles-based virtual reality/augmented reality company.

■ **Forrester Research**, Cambridge, Mass., reported total revenues of $89.7 million for the second quarter of 2017, compared to $87.8 million for the second quarter of 2016. Research revenues decreased 1 percent and advisory services and events revenues increased 7 percent compared to second-quarter 2016.

■ Louisville, Colo., customer experience management firm **Market Force Information** has closed a management-led buyout of the company in partnership with Houston-based principal investment firm Main Street Capital.

■ Stamford, Conn., technology research and advisory firm **Information Services Group** reported revenues of $68 million for second-quarter 2017, compared to $60.4 million the previous year.

■ San Francisco-based data analytics firm **Databricks** has secured $140 million in a Series D funding round led by Andreessen Horowitz, with participation by New Enterprise Associates and Battery Ventures. The funding brings the firm's total capital raised to $247 million and will be used to expand investment in its Unified Analytics Platform.

CALENDAR OF EVENTS

●●● can't-miss activities

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

Applied Marketing Science will hold a training workshop, 'Listening to the Voice of the Customer,' on **October 11-12** in **Chicago**. Visit bit.ly/2gMBepm.

The Merlien Institute will hold its Qualitative360 APAC event on **October 11-12** in **Singapore**. Visit apac.qual360.com.

IQPC will hold its Call Center Week (CCW) Fall event on **October 16-19** at Horseshoe Bay Resort in **Horseshoe Bay, Texas**. Visit www.callcenterweekfall.com.

The Insights Association will hold the 2017 Corporate Researchers Conference (CRC) on **October 16-18** in **Chicago**. Visit bit.ly/2tjVVL5.

The American Statistical Association will hold the 2017 Women in Statistics and Data Science Conference on **October 19-21** in **La Jolla, Calif.** Visit bit.ly/2wG8rs5.

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.

KNect365 (IIR) will hold The Market Research Event (TMRE) on **October 22-25** at the Rosen Shingle Creek in **Orlando, Fla.** Visit marketing.knect365.com/tmre.

KNect365 (IIR) will hold its Back End of Innovation event on **October 22-25** at the Rosen Shingle Creek in **Orlando, Fla.** Visit marketing.knect365.com/bei.

KNect365 (IIR) will hold its CX Next conference on **October 22-26** at the Rosen Shingle Creek in **Orlando, Fla.** Visit marketing.knect365.com/cx-next.

Society of Insurance Research will hold its Annual Conference and Exhibit Fair on **October 22-25** in **Milwaukee**. Visit www.sirnet.org.

The 2017 Pharma Market Research Conference (Europe) will be held on **October 24-25** in **Dusseldorf, Germany**. Visit bit.ly/2cheElU.

Research & Results will hold its annual trade show on **October 25-26** at the MOC Convention Centre in **Munich**. Visit bit.ly/2w6PBGW.

MRIA will hold its Qualitative Research Conference on **November 2-3** in **Toronto**. Visit qrc2017.mria-arim.ca.

ESOMAR will hold its Global Qualitative 2017 event on **November 5-7** at the Crowne Plaza Porto in **Porto, Portugal**. Visit www.esomar.org.

The Merlien Institute will hold its MRMW Europe 2017 event on **November 8-9** in **Berlin**. Visit eu.mrmw.net.

American Association of Advertising Agencies will hold its 2017 CreateTech conference on **November 9** in **Los Angeles**. Visit createtech.aaaa.org.

KNect365 (IIR) will hold its 2017 OmniShopper International event on **November 13-15** at Tryp Barcelona Apolo Hotel in **Barcelona, Spain**. Visit marketing.knect365.com/omnishopper-intl.

The New England Insights Association will hold its 2017 Fall Conference on **November 14** at the Conference Center at Waltham Woods in **Waltham, Mass.** Visit bit.ly/2gNdMbj.

The Strategy Institute will hold the 4th Annual Digital Marketing for Financial Services Summit U.S. event on **November 14-15** in **New York**. Visit bit.ly/2xasCj8.

MRS will hold its Financial Services Market Research conference on **November 16** in **London**. Visit www.mrs.org.uk.

ESOMAR will hold its Big Data World 2017 event on **November 27-29** in **New York City**. Visit www.esomar.org.

American Economic Association will hold its Annual Meeting on **January 5-7** in **Philadelphia**. Visit www.aeaweb.org/conference.

MREF will be taking a vision trip to Haiti to visit the Joseph School on **January 18-21**. Visit mrgivesback.org.

QRCA will hold its 2018 Annual Conference on **January 24-26** at the Phoenix Marriott Tempe at The Buttes in **Phoenix**. Visit www.qrca.org.

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

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10 minutes with...

Christa Melotti
International Research Lead, Vanguard

Christa Melotti

> *"Learning what the laws are around marketing research and how that may differ depending on which methodology is used is very important to know before launching into any work."*

How has your background in the retail/fashion industry influenced your work as a marketing researcher?

Working in retail, specifically as a merchandiser, made me realize how client, or customer, behavior can deeply affect a business. Having the insight to be able to forecast client/customer needs as well as learning how to quickly adjust a large seasonal buy so it isn't detrimental to the business – especially financially – was a large takeaway.

What aspects do you enjoy most when conducting international studies?

The cultural nuances that vary from country to country or region to region fascinate me. Understanding even simple research things such as what typical research recruitment methodologies are in various parts of the world or how a respondent in one region may use a rating scale differently are very interesting to me, and pertinent to know.

What tips would you give a researcher beginning his or her first international study?

Being a researcher I would say research as much as you can before starting any international work. Look to understand the region's customs, culture. There are some great books and resources that detail regional differences in a business setting that can be a great start. Learning what the laws are around marketing research and how that may differ depending on which methodology is used is very important to know before launching into any work.

I think it's also worth noting there may need to be additional regional understanding depending on what type of research will be done. If you are doing quant-based work, look to see the order of questions asked. It's important to note even simple things such as the order of the numbers or where to place a 0 in a scale can vary. Such detail can quickly let a respondent know if the study is being done by a U.S.-based firm or is in-country – revealing more than you'd like if the study is blind. Understanding the soft skills in a region and using your emotional intelligence when in-country conducting work can be very useful as well. Seeing if there are phrases or words that are inflammatory or frowned upon is also very helpful, as well as any slang or lingo typically used in that region. Knowing how the culture values time is important if you're conducting focus groups or interviews. Learning how to quickly read a respondent's reaction and how to pivot if needed is important in qual work, whether you're inside or outside of the U.S.

Are there any new methodologies you would like to explore in the next year and why?

As we live in a world that's changing at lightning speed and where we do more and more online, utilizing online communities and leveraging social media to listen and learn from user patterns can help a company understand new trends in their industry. I think understanding a client's digital experience is something that's vital for all companies.

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