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For marketing research and insights professionals

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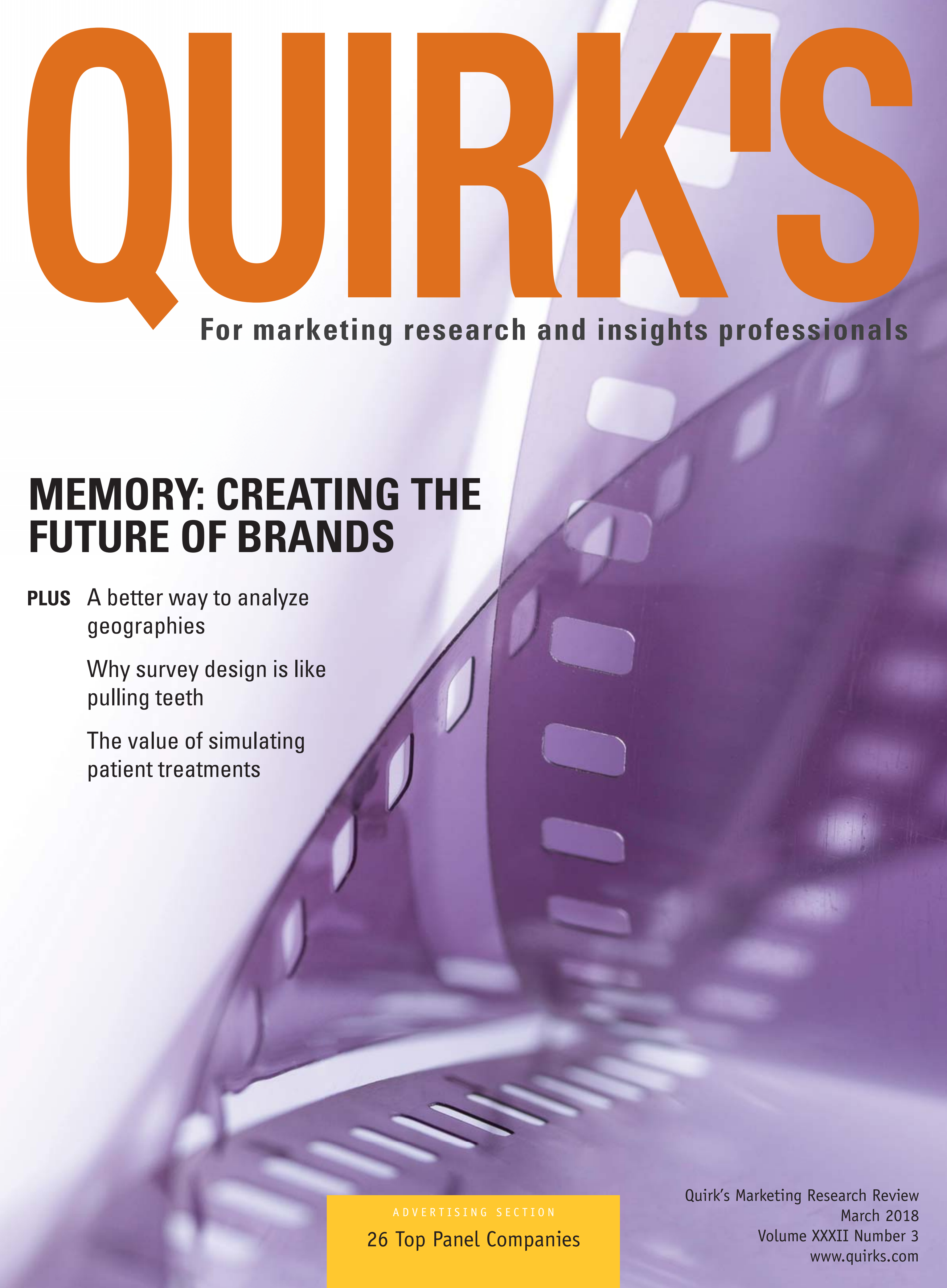

ADVERTISING SECTION

26 Top Panel Companies

Quirk's Marketing Research Review
March 2018
Volume XXXII Number 3
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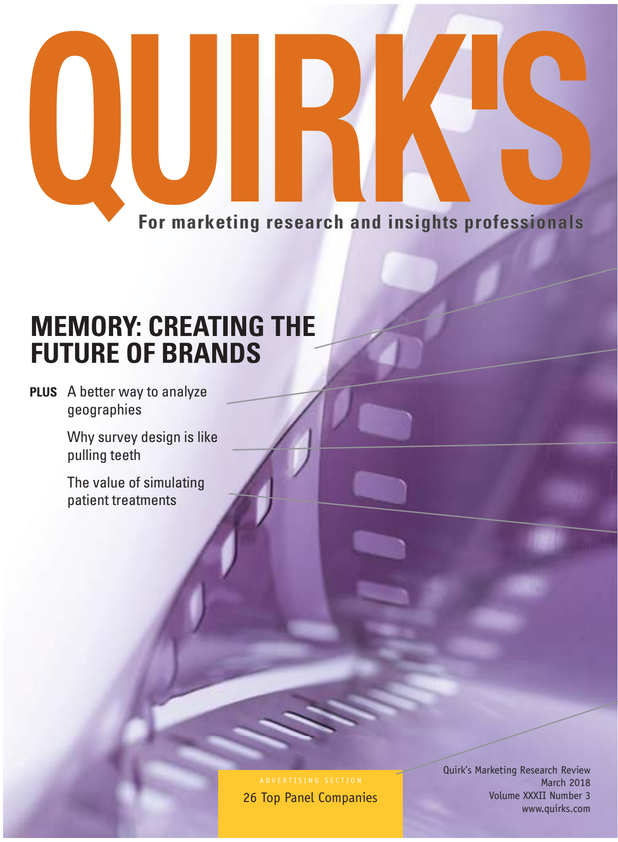
CONTENTS

Quirk's Marketing Research Review
March 2018 • Vol. XXXIII No. 3



page 28
page 42
page 48
page 36
page 52

DEPARTMENTS

ON THE COVER

TECHNIQUES

COLUMNS

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••• online, e-newsletter and blog highlights

••• Quirk's online

A quantitative look at Quirk's in 2017

From Quirk's Marketing Research Review to our e-newsletters, practitioner-driven blogs, social media accounts and directories, Quirk's works to provide you with quality, engaging content.

Every year around this time we take a quantitative look at the previous year to see how far we've come, set goals for the future and share our progress with you!

Total Web site visits in 2017	997,821
Web site page views in 2017	1,966,821
Percent of visitors classified as new visitors	69 percent
Total new subscriber accounts created in 2017	7,956
Marketing researchers in Quirk's database	77,458
Percent of subscribers receiving the magazine digitally or via mobile app	76.4 percent
Mobile apps downloaded	10,475
Deliverable and unique e-newsletter subscribers	47,347
Number of articles published in 2017	384
Members of The Marketing Research & Insights Group, powered by Quirk's	50,506
Event and Webinar attendees in 2017	2,500+

// E-newsworthy

Using mobile research techniques to minimize response bias

www.quirks.com/articles/2018/20180126-3.aspx

The persistence of quantitative research

www.quirks.com/articles/2018/20180126-2.aspx

Educating internal stakeholders on the importance of marketing research

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// Noted Posts

QuirksBlog.com

Emotion, excitement and entertainment: A look at Super Bowl LII Ads

https://goo.gl/N9PTKE

My husband's leery of phone surveys

https://goo.gl/aV6jDn

Study looks at hiring environment for creative professionals

https://goo.gl/iPYXjR

ResearchIndustryVoices.com

La Croix owes success to packaging research

https://goo.gl/unbZNn

Are consumers embracing voice-activated shopping?

https://goo.gl/dXLJGD

The Xennial outlook on finance, tech and home life

https://goo.gl/FA3xyG

ResearchCareersBlog.com

Benefits of investing in a recent marketing research graduate

https://goo.gl/Z4EJRM

8 leadership mistakes that diminish employee trust

https://goo.gl/H8hM27

Leaders, keep the human perspective in the innovation process

https://goo.gl/BP5PEx

••• lifestyle research

Good health makes for a good life

Researcher GfK asked 23,000 consumers online in 17 countries about what factors they personally see as being part of the life they would like to have. Good health was selected by nearly eight out of 10 of respondents, while financial security attracted seven out of 10 and leisure time nearly six-and-a-half out of 10. Over half of people also see a happy marriage, travel for leisure, a home you own and control over one's life as being part of the good life. And exactly half include having an interesting job.

In contrast, less than half of people include children, spiritual enrichment or a yard and lawn or nice garden. And less than a quarter include really nice clothes, accessories or jewelry, a college education, the latest electronics and gadgets or a luxury or second car.

College education has greater "good life" resonance with younger age groups than older ones. Teenagers lead with 29 percent including this, falling to 26 percent of 20-29-year-olds and 23 percent of those aged in their thirties and forties, with further drops for those in their fifties and sixty-plus.

Good health, financial security and control over one's own life are most popular among older age groups than younger ones for their vision of a good life. For financial security, this is led by those aged 60 plus, where 78 percent include this, and then falls steadily for each consecutively younger age group, to reach just 64 percent of teenagers.

www.quirks.com/articles/2018/20180301.aspx

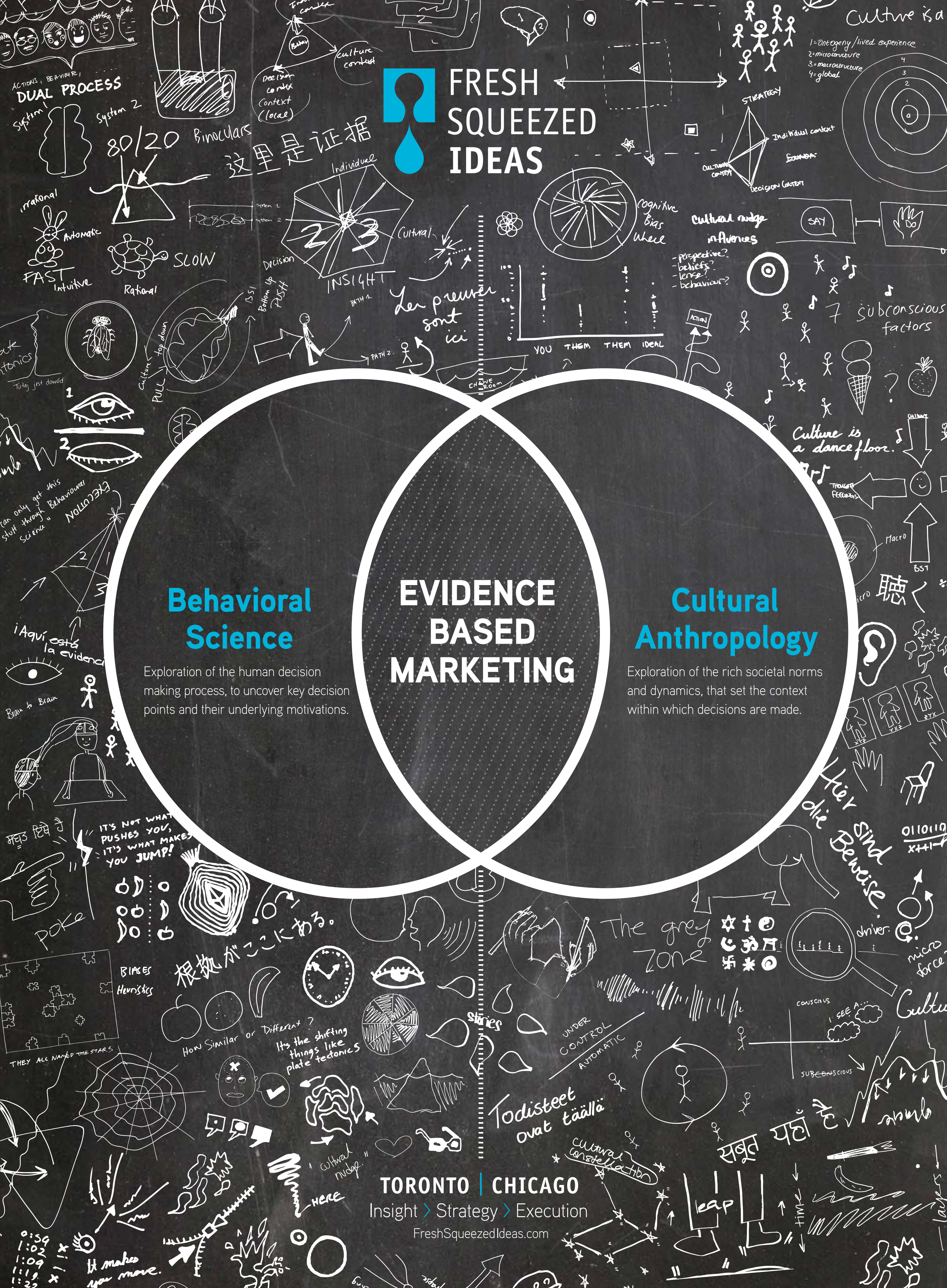
••• financial services

Consumers ready to say goodbye to passwords

According to a Visa survey of 1,000 Americans, conducted by AYTM Market Research, 86 percent of consumers are interested in using biometrics to verify identity or to make payments and more than 65 percent of consumers are already familiar with biometrics. Seventy percent of consumers believe that biometrics are easier and 46 percent think they are more secure than using passwords or PINs.

Consumers were most familiar with fingerprint recognition, with 30 percent having used it once or twice and another 35 percent using it regularly. By comparison, about 32 percent have used voice recognition in the past and only 9 percent use it regularly. Seventy percent of respondents find biometrics easier than passwords and 61 percent consider it faster. Fewer than a third of consumers use unique passwords for each of their accounts.

Fifty percent of consumers responded that the top benefit of using biometrics is eliminating the need to remember multiple passwords or PINs, followed by 46 percent who said that biometrics is more secure than passwords or PINs for verifying identity. Forty-nine percent are concerned both about the risk of a security breach of sensitive biometric information and that biometric authentication won't work well or will take multiple tries.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By Joseph Rydholm, Quirk's Editor

This time, the lights stayed on


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Joe Rydholm can be reached at joe@quirks.com

The 2018 West Coast Quirk's Event is in the books and I'm happy to say we made it through the late-January conference without a power outage. As you may recall, on the morning of Day 2 at the 2017 gathering, the hotel and many of the neighboring office buildings lost power due to a blown transformer. We all soldiered on just fine and were blessed to see the industry's can-do attitude kick into high gear to make the best of an unfortunate situation.

No such moxie was needed this time around. We enjoyed a 15 percent bump in client-side attendance and the sessions I sat in on were busy and lively, as was the expo hall.

To shake things up a bit for next year, we won't have a California Event and will instead stage our usual Brooklyn show in between Events in the new sites of London and Chicago. As producers of English-language content, expanding to the U.K. is a natural fit for us and our audience research has shown us that Chicago is a good location for those exhibitors and client-side researchers who may not want to trek across the country to the East Coast.

In looking back over my notes for interesting nuggets to pass along from the sessions I attended, many themes jumped out but one that stuck with me was the value of looking at the research process from the perspective of those who will be using the data and insights you generate.

As researchers, you are trained to focus on rigor and method and statistical validity – all of which are certainly important. But, as some of the speakers observed, the brand managers or marketers or C-suite people who need to make decisions based on your work typically don't care about or have time to pore over those kinds of details. And so when a researcher delivers a presentation of findings (and, hopefully, implications) and spends too much time on methodology, some end users may view that as an annoyance at best or at worst as an indication that the insights department doesn't value their time. If that happens, guess who won't be consulted next time there's a need for marketplace intelligence?

As part of his larger talk on how he and two other colleagues transformed the consumer insights division at video game titan Blizzard Entertainment into a trusted and influential part of the company, Mike Swiontkowski stressed the value of understanding stakeholders' challenges and initiatives, as a way to show them you want to be responsive to their needs and are aiming to deliver valuable insights. Connect with them often so you can keep them in the loop on what you are working on and reinforce that you are there for them when an information need arises.

The value of a research project is entirely determined by the value that the person receiving the information puts upon it, observed Bruce Olson of MMR Research as part of a session on the problems with measuring the ROI of research. Senior management spends a ton of money on things they can't directly prove the ROI of, such as public relations or human resources, so why are researchers so focused on doing it? One reason is because researchers are, well, researchers and measuring things is part of their DNA.

Instead of grappling with a slippery metric like ROI to prove the value of what they do, researchers should instead strive to understand how their clients define a successful interaction with the research function. Is it merely getting some helpful directional information? A definitive go/no-go decision? Learning about a core consumer segment's unmet need?

No matter the form it takes, end users want researchers to deliver a point of view, Olson said, rather than mere data. After all, it's much harder to deliver a point of view than just an insight. Understanding and communicating the business context and outlining the impact on business decision-making of what the research uncovered will go a long way toward showing your internal clients that you're seeing things from their perspective. And the more they view you as a source of strategic guidance, the more their own perspective on what you bring to the organization will change.

www.quirks.com/articles/2018/20180302.aspx

IN FOCUS

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

// Survey Monitor

••• health care research

Medicare, Medicaid valued but future uncertain

Health care pros, patients weigh in

Eighty percent of health care professionals and 70 percent of consumers are concerned about the sustainability and affordability of government-funded health care, yet more than two-thirds of both groups don't feel that they have the ability to preserve it for future generations, according to research conducted by Omaha, Neb.-based StrategicHealthSolutions and research firm W5, Durham, N.C.

The survey, conducted during the height of the health care debate last summer, aimed to understand how industry professionals – doctors, nurses, nurse practitioners and physician assistants – and their patients feel about the state of government-funded health care in America, specifically Medicare and Medicaid. More than 80 percent of respondents said federal and state elected officials hold the greatest responsibility for preserving the health care safety net and nearly 70 percent of consumers and health care professionals agreed that access to affordable health care for all Americans is a right, not a privilege.

Comparatively, more than half of both groups said they felt a personal responsibility to act to preserve these programs. "What we're seeing is that consumers and health care professionals in general feel disenfranchised by the health care debate in Congress," says Peg Stessman, CEO of StrategicHealthSolutions. "Individual responses from the research showed that many feel their representatives simply aren't listening to them. This signals, to me, that we need to move past 'what can Congress do' and start focusing on where we can all make a difference."

The research also addressed specific issues impacting the sustainability of Medicare and Medicaid, such as shifting costs from the government to individuals – a concern for nearly 70 percent of consumers and professionals. Both groups showed willingness to change specific behaviors that would curb rising Medicare and Medicaid costs and extend the lifespan of these programs. Health care professionals were willing to encourage their patients to participate in wellness programs (83 percent) and to complete educational activities for themselves and their staff (66 percent) to help keep costs of Medicare and Medicaid down. Consumers said they would be "willing to comply with doctor's orders" to prevent exacerbations of current health conditions (72 percent), use tools to calculate costs (63 percent) and participate in wellness programs to more proactively manage their health (63 percent).

"While this data is encouraging, consumers and health care professionals are still skeptical that they can impact the lifespan of Medicare and Medicaid," says Stessman. "The gap between feeling a responsibility to change health care and their ability to do so is an area we need to address, regardless of what Congress does or doesn't do. We all need to check our health care habits and start getting serious about what we can do to preserve these programs for future generations."

www.quirks.com/articles/2018/20180303.aspx

••• shopper insights

Supporting those who support them

Military veterans like U.S. brands

Military veterans are confident in their brand choices and place a great deal of importance on brands they feel support them and their country, according to a study conducted by military media brand We Are The Mighty and research firm Maru/Matchbox.

Over 1,700 active and retired military servicemen and women were surveyed on attitudes, behaviors and brand use across numerous categories. In addition, 1,500 non-military individuals were interviewed using the same methodology for comparison to census.

Sixty-six percent of servicepeople surveyed agree that they are "more likely to buy brands that are made in the U.S." (versus 49 percent for civilians). Sixty-one percent say that "buying American products is important to me" (versus 44 percent for non-military). More than half (57 percent) of current and former servicemen and women "seek out brands that support the troops or are militarily friendly" (versus 16 percent civilians). Seventy percent (significantly above the 29 percent of civilians) are "more likely to buy brands that support U.S. veterans." Sixty-one percent say that "quality [of a product] is more important than price" (versus 54 percent non-military). Thirty-eight percent are "willing to pay more for a product that supports the causes I care about" (versus 33 percent non-military).

Military members and their families engage in both online and in-store shopping. Expect to find military members and their families shopping in superstores like Target and Walmart (80 percent), drug stores like CVS and Walgreens (57 percent) and sporting goods stores like Dick's and REI (47 percent versus 25 percent of non-military) but also online on Amazon (75 percent).

Active-wear is also a significant purchase category, with 29 percent making a purchase online (versus 26 percent non-military) and 55 percent in-store (versus 45 percent).

The military is the gaming industry's best consumer: 73 percent own a gaming console, well above the 54 percent of the non-military. Thirty percent plan to purchase a new gaming console in the next year, nearly double the 17 percent of non-military. And they are gaming on all devices: 66 percent play games at least once a week on a smartphone (versus 50 percent of non-military), 44 percent on a play games on a computer and 32 percent play games on a tablet and 17 percent use a handheld gaming device such as a Nintendo 3Ds.

Those who purchased games spent an average of $114 in the past year on console games (versus $104 for non-military), $75 for computer games ($66 for non-military) and $49 on gaming apps ($43 for non-military).

Service members are also embracing subscription-based music and video. Active and veteran members who engage in each media spend an average of 6.5 hours listening to satellite radio (versus 4.7 for non-military gen-pop), 7.6 hours streaming music from free sites or apps (versus 6.5) and 10 hours streaming music from paid streaming sites (versus 7.6).

They are also more likely to subscribe to pay services such as Sirius XM (19 percent vs. 13 percent), Spotify (paid) (17 percent vs. 11 percent), Amazon Music Unlimited (13 percent vs. 9 percent), Apple Music (paid) (12 percent vs. 7 percent) and Pandora (paid) (9 percent vs. 6 percent).

They spend an average of 9.8 hours a week streaming from sites like Netflix and Hulu (versus 9.0 non-military). They are more likely to subscribe to Netflix (72 percent vs. 57 percent), Amazon Prime Video (45 percent vs. 36 percent) and Hulu (29 percent vs. 21 percent) than gen-pop. Sixty-six percent watch movies on streaming subscription services like Netflix at least once a week (versus 48 percent of non-military). Military families are also more likely to go over-the-top with subscriptions to stand-alone TV services like HBO Now and CBS All Access (12 percent vs. 5 percent).

Technology brands also connect with those who serve. Nearly half of active and retired military personnel (45 percent) say they "like to stay up to date on the latest technology trends and products" (versus 40 percent of non-military). They are more likely than the general population to own a tablet (63 percent vs. 59 percent), a smart TV (53 percent vs. 44 percent), a device for streaming to TV (40 percent vs. 34 percent), an e-reader (33 percent vs. 24 percent), a wearable device like an Apple Watch or Fitbit (32 percent vs. 24 percent) and a connected-home device like an Amazon Echo or Google Home (17 percent vs. 14 percent). Besides owning these devices, they are also in the market to buy them, with 38 percent looking to purchase a new mobile device and 31 percent looking to purchase a new TV in the next year.

••• technology research

Thermostats, yes. Diagnoses, no.

Canadians generally comfortable with AI

Canadians report that they are comfortable using AI technology in areas like controlling their house temperature but less so in areas that affect their personal lives. These findings are from the annual Canadian Artificial Intelligence Tracker, which was conducted by the Research and Analytics Services team of Toronto-based research firm Sklar Wilton & Associates.

While Canadians are comfortable using artificial intelligence to control their house temperature (73 percent), utilities and appliances (59 percent), scheduling and appointments (70 percent) and shopping/eating recommendations (59 percent), they aren't so open when it comes to areas directly affecting their well-being. Less than half of Canadians are comfortable with AI diagnosing their medical conditions without doctor involvement (43 percent) and even fewer are comfortable with AI driving vehicles without human involvement (39 percent).

While comfort levels vary among different areas of work and home life, adoption of AI at a personal level is still in its infancy. Just 12 percent report that they already use AI technologies in their personal life and a similar number (11 percent) say that they use them at work. Trust is also precarious and rests highly on transparency from companies – more than three-quarters (78 percent) of Canadians say they require to know whether they are talking to a human being or a chatbot. Many consumers feel suspicious towards the companies that implement them, with 41 percent stating that companies using AI are focused on reducing their costs at the expense of people.

What does this mean for marketing and business? Most businesses are gearing up to adopt and develop AI strategies into their products and services. However, if they want to be successful, they must put the consumer dimension at the forefront of their AI strategy. They will need to:

Foster consumer-driven innovation: Shape the end-user experience in a positive way by satisfying specific needs rather than simply using AI for upselling.

Establish high ethical standards: Personalize content so it's useful for consumers and not simply a manipulation of human psychology. Rather than using AI technologies to maximize short-term gains leading to increased customer attrition, create AI technologies that help to build trust and foster long-term customer satisfaction and engagement.

Be transparent and honest in communications: Be prepared to raise business standards and increase transparency around how AI technologies are used. Take advantage of AI capabilities to dramatically improve customer service and engagement.

The full report is available at https://goo.gl/akPDHn.

The Canadian Artificial Intelligence Tracker was conducted by Sklar Wilton & Associates among Canadians 18+ with data collected from July 31 to August 7, 2017. Participants were selected from among those who have volunteered to participate in online surveys. The data were weighted to reflect the *demographic composition of adult Canadians. Estimates of sampling error cannot be calculated. All sample surveys are subject to error, including, but not limited to sampling error, coverage error and measurement error.*

••• advertising research

Top-scoring ads show power of emotion

Digital over broadcast

Research firm System1 released its most recent FeelMore50 list, an analysis of consumer emotional response to brand advertising. The global survey asked over 55,000 consumers about 700 ads, chosen from a base of industry award-winning or virally-successful TV commercials and digital films.

The list – published online at www.feelmore50.com – shows the diversity of emotional advertising in the digital age. The top 10 emotional commercials cover categories from cars to biscuits to zippers and represent markets around the world.

For the first time, a British ad took the top spot. "Next Stop: Good Mornings," made by agency Gravity Road for snack brand Belvita, takes its cue from the concept of Blue Monday, the most depressing day of the year. Belvita puts a comedian on a train to entertain its passengers and turns the blues into a great start to the day.

"Belvita is a great example of emotional advertising. It does two things particularly well. It has a terrific emotional idea – beating the blues on Blue Monday – and it has a brilliant central character in George, the comedian guard. It can be tough to make British consumers smile, so for a British ad to get the best results out of any of the 700 we tested is quite an achievement," says Sarah Patterson, commercial director, System1 Research.

All the ads on the FeelMore50 list scored the highest five-star ranking in System1's tests, which measure what people feel about an ad and how intensely they feel it. The method is based on studies showing that emotional response is a predictor of long-term profitable growth from an ad.

"Emotional advertising gives you more bang for your buck. We've shown that at the same level of investment, a five-star ad delivers three times the long-term share growth of an average, two-star ad," says Alex Hunt, president, System1 Research.

The top 10 ads are:

Belvita – "Next Stop: Good Mornings" (U.K.) (Gravity Road). Train guard makes people happy.
YKK – "Zipper & Bears" (Japan) (Adk Asatsu DK). Cute bears on child's top come to life.
Jameson Whiskey - "The Long Lost Barrel" (U.S.) (EVB). Parody of heritage-based whisky ads.
Netto Marken Discount – "Die Oster-Überraschung – #DerWahreOsterhase" (Germany) (Jung von Matt). Animated story of the Easter Bunny.
President's Choice – "Eat Together" (Canada) (John St.). Guests in hotel eat together in corridor.
Coldwell Banker – "Somebody to Love" (U.S.) (Siltanen & Partners). Sad man adopts sad dog.
Monoprix – "Lait Drole La Vie" (France) (ROSAPARK). Romance communicated via supermarket own-brand labels.
Nespresso – "Coming Home" (U.S.) (McCann New York). George Clooney travels the world in search of Nespresso.
Kia – "Hero's Journey" (U.S.) (David&Goliath LA). Melissa McCarthy as eco-warrior getting into comical trouble.
McDonald's – "McLanche Feliz" (Brazil) (DPZ&T). Monster drawn by child brought to life by McDonalds.

The big themes coming out of this FeelMore50 relate to brands dealing with two huge cultural shifts – a shift in media as digital consumption becomes more and more vital and a political shift as consumers reel from an era of shocks and uncertainty.

For the first time, none of the top five FeelMore50 ads were aired on TV. There are still great TV ads being made – and it's still the single biggest medium for advertising – but emotional advertising and digital fit well together, as the lower media cost and wider storytelling canvas democratize emotional communications. When a brand like Japanese zipper manufacturer YKK can score the second-most emotional ad of the year, you know emotional advertising really is open to anyone.

Advertisers for global brands don't want to ally themselves with political nationalism but they're happy to celebrate national traits and stereotypes – as long as it's done with love and self-knowledge. The FeelMore50 Top 10 includes grumpy Brits, French lovers, footballing Brazilians and hospitable Canadians – all presented by brands leaning in to national traits and scoring emotionally. As for the new age of political conflict, brands are as liberal as ever. But even ads with a heavy dose of brand purpose balance it with laughter, like Kia's "Hero's Journey" spot with Melissa McCarthy.

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Product and Service Update

••• data analysis

Heap platform automates insights

Features three layers

San Francisco-based insight automation firm Heap has introduced a platform to automate all phases of customer insights. The platform captures, validates and connects all customer data, allowing companies to derive customer insights to drive better business decisions. Heap's autonomous customer insights platform has three layers: data capture, control and insights. The data capture plane compiles behavioral data from sources across departments and domain-specific tools into one standard schema; the control plane assures data integrity and ability to change event definitions on the fly; and the insights plane produces networked insights across marketing, sales and customer-success silos.

Several additions have been made to each layer, including:

Non-destructive data modeling: Like modern music or photo editing, data professionals can define and model new insights without touching the raw data structure, unlocking faster iteration. Virtual event definitions enable retroactive updating of metrics on the fly wherever they are used.

Sources: Fifteen new data source connectors have been added to strengthen a connected network of customer insights, including Salesforce, Marketo and e-mail and payment providers. All history and events are available with one-click connectivity and no custom coding required.

Data integrity score: A data-scoring system ranks all customer data by level of usefulness and trustworthiness to empower companies to measure, define and control how data is accessed across the business.

Dashboards: Data visualization reports across silos of departmental data provide a bird's-eye view of customers to break down team barriers and speed time to insight.

www.heapanalytics.com

www.quirks.com/articles/2018/20180304.aspx

••• shopper insights

Tools analyze shopper data across outlets, events

Aimpoint Research, Dialogica team up

Research firms Aimpoint Research and Dialogica have partnered to merge multiple proprietary approaches to create a video analytics offering and customer experience optimization platform that tracks, measures, analyzes and segments shopper buying behaviors across traditional retail outlets (supermarket, mass, c-store, food-service, etc.), OOH advertising, experiences and events.

The partnership integrates Dialogica's technology platforms with Aimpoint Research's Fusion methodology to capture and contextualize the rational, functional and emotional drivers explaining the consumer path to purchase. Aimpoint CXO (Customer Experience Optimization) combines multidisciplinary research methodologies with video analytics, turning IP security cameras into a visual auditing and business intelligence tool capturing traffic metrics and heatmaps of a monitored area (Eye in The Sky). Dialogica Dianalytics video-analytics platform utilizes micro-cameras and other technologies to trace the shopper's path from entrance to shelf to final purchase (or lost purchase), capturing interactions, mood, dwell time, demographics and responses. These non-intrusive and privacy-compliant technologies can be combined with internal sales data and transferred into an online dashboard displaying real-time metrics tracking promotional and advertising effectiveness, space allocation, new products, planogram effectiveness, etc.

www.aimpointresearch.com

••• market analysis

GutCheck debuts big-data product

Addresses fragmentation, personalization

Denver research firm GutCheck has launched GutCheck Constellation, a solution designed to combine survey data with big data to give clients research-grade insights, powered by billions of consumer profiles. This application of big data aims to help researchers and marketers solve complex business problems like market fragmentation and mass personalization. The $18 billion shift in share from large to small and mid-size businesses in 2017 indicates that consumers want to feel that products are tailored to them. They want to feel connected to the brands they buy from. This new solution seeks to identify opportunities for market growth, provide a picture of target consumers and tell clients how to effectively tailor messages to consumers and target them based on attributes like media consumption, lifestyles, social listening and other behavioral data, thus helping clients build products and content that feel tailored to the individual who is seeing their ad.

www.gutcheckit.com

Briefly

San Francisco-based customer interaction platform Swrve has introduced its Intent Engine, which provides real-time behavioral insight relating to customers or prospects and allows Swrve customers to read and target consumer intent and propensity.
www.swrve.com

Southborough, Mass., firm Research Rockstar has launched an e-learning training catalog for 2018, which includes 28 e-learning courses available in real-time and on-demand.
www.researchrockstar.com

New York-based B2B data firm Bombora is offering its custom automatically-refreshed audience segments through Singapore-based audience data firm Eyeota. The updated segments are generated by Bombora's Company Surge data and are available for several marketing verticals and product lines. Through a custom-created segment, Eyeota facilitates the "always on" cookie match by providing new data points every seven days.
bombora.com
www.eyeota.com

Franklin, Tenn., firm Harpeth Marketing has released its 2018 MediaBook, a reference guide to the advertising, promotional and marketing opportunities available in the market research industry. The guide is available for free on the firm's Web site.
www.harpethmarketing.com

In Cincinnati, Nielsen Catalina Solutions and Nielsen have launched a new industry research study aimed at understanding strategies for building CPG brands. Partnering with CPG advertisers, media companies and industry organizations, Nielsen Catalina Solutions and The Ehrenberg-Bass Institute will analyze data from 50 brands across three-and-a-half years to understand the best strategies for building brands in today's media environment.
www.ncsolutions.com

New York-based brand intimacy agency MBLM has introduced Synzi, a communications platform designed to improve patient engagement and care delivery for the health care industry.
mblm.com

Stockholm-based software company Cint has launched an AI-based automatic sample delivery available to users of Access Pro, its sample procurement tool. The automatic sample delivery spans across all types of panel sources, including hosted double-opt-in, single-opt-in, API-connected and real-time sampling traffic. By using AI-based technology, the system samples automatically on an individual panelist basis and will field needed interviews within the required time periods.
www.cint.com

Adaptive Q-sort: a new approach for prioritizing customer preferences

| By Michael Garver

snapshot

Michael Garver draws from a software-company case study to illustrate the use of adaptive Q-sort for understanding product attribute importance.

In boardrooms all over the world, executives want to know what product and service attributes and features are most important to customers. With this information in hand, executives can tailor their offering to best meet the needs of customers to gain a competitive advantage in the marketplace.

There are a number of marketing research techniques available to help practitioners prioritize the importance of attributes, yet many of these research techniques have serious flaws and limitations. Chrzan and Golovashkina (2006) examined a number of the common research methods for eliciting attribute importance and they suggest that commonly-used methods such as stated importance or preference rating scales have severe limitations and often result in biased and misleading results. Rank-ordering and constant sum are intuitively appealing, yet these methods prove to be difficult when the list of attributes exceeds five or seven, which is often the case for research practitioners. These researchers suggest that maximum difference scaling and Q-sort are the best research methods for prioritizing the importance of attributes.

Chrzan and Golovashkina (2006) suggest that Q-sort is an excellent research method for gathering customer preferences for a long list of potential customer needs or proposed product features. These researchers found that Q-sort outperformed all research methods except for maximum difference scaling. At the same time, Q-sort took the least amount of customer time to complete the survey, whereas maximum difference scaling took the longest time to complete. In addition, maximum difference scaling can only be implemented with special software which may not be available to all researchers. In short, Q-sort is an excellent alternative to maximum difference scaling. However, Q-sort makes the assumption that all attributes in the exercise are important to all respondents. If this assumption is not valid, then the results can be very biased and misleading.

The author was working with a software company where this assumption was not valid. As a result, the author developed and implemented a simple but effective approach called adaptive Q-sort, which ensures that all features in the exercise are relevant and important to all respondents. The purpose of this article is to introduce adaptive Q-sort and to discuss how to implement it.

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Q-sort

Q-sort imposes a quasi-normal distribution onto customer preferences by asking customers to place different features into different preference groups, with each group having a different level of preference. For example, if the researcher wanted to examine preferences of 10 features, the customer would place a specific number of features into five different categories of preference (1-2-4-2-1), with each category getting a different number of preference points. For example, the customer would have to select the one proposed feature that is

Table 1

	Actual Preference	Traditional Q-Sort	Adaptive Q-Sort
Feature A	0	1	0
Feature B	0	2	0
Feature C	0	2	0
Feature D	0	3	0
Feature E	0	3	0
Feature F	1	3	1
Feature G	1	3	2
Feature H	2	4	3
Feature I	4	4	4
Feature J	5	5	5

most preferred and this feature would receive five points. Then, the customer would select the two proposed features that are second-most preferred and these features would receive four points. Then, the customer would select the four proposed features that are third-most preferred and these features would receive three points, followed by the customer selecting the two proposed features that are fourth-most preferred, which would get two points. Finally, the customer would select the one proposed feature that is least-preferred and this feature would receive one point. Q-sort imposes trade-offs into the prioritization process, which is a desirable characteristic.

Assumptions and limitations of Q-sort

Like any research method, Q-sort has certain assumptions and limitations. Q-sort imposes a normal distribution on the data that may or may not be appropriate. In most situations, researchers will not know the distribution of customer preferences until the research is complete. Related to this assumption, Q-sort assumes that all features in the study are actually relevant and important to all customers. If these assumptions are violated, then the results may be biased and skewed.

These assumptions can be troublesome in some situations. Anecdotal evidence suggests that practitioners often explore a large number of new potential product features that are simply not important to all customers. There is tremendous pressure on brand managers to strengthen or maintain a product's competitive advantage, which influences brand managers to constantly improve and add new product features. As a result, a large number of proposed features are tested with customers and experience suggests that not all customers place value on all of these new product features.

From a segmentation perspective, it is common that the marketplace will typically have a "basic needs" segment, which values basic performance at a low price. These customers will likely prefer basic features that support the basic functions of the product, thus keeping the price low. Many new proposed features may not be important to this group.

To examine the potential problem of this assumption being violated, imagine the following scenario for a single respondent (see Table 1). Assume that five of the 10 features are not relevant or important to this respondent. Concerning the respondent's actual preferences, only five of the 10 features have preference scores, ranging from 1 to 5. Clearly, the actual preference scores for this respondent do not have a normal distribution.

Implementing traditional Q-sort, the customer is forced to give some level of preference to each feature. In our example, the customer would be forced to give Features A through E a preference score between 1 and 3, when in reality these features have zero preference. To improve this approach, the researcher needs to remove those features from the traditional Q-sort exercise before the exercise begins. In short, product features that have no preference for a given customer should not be allowed to enter that customer's Q-sort exercise.

Adaptive Q-sort does exactly that; it removes the features with no preference from the Q-sort exercise before it ever begins. To enter the

Table 2: Assigning Preference Points to Choices	
Preference Groups for Proposed Features	**Preference Points**
Feature already performing "very well" in competitive software	0
Feature adds no value	0
Most preferred feature (only one feature selected)	9
Second-most preferred feature (only two features selected)	7
Least-preferred feature (only one feature selected)	1
Two least-preferred features (only two features selected)	3
Remaining features not selected	5

adaptive Q-sort exercise, the features must have some level of preference for that customer. As displayed in Table 1, adaptive Q-sort does not perfectly capture the preferences either because the data do not have a normal distribution. However, there is much less error as compared to a traditional Q-sort approach. We propose that adaptive Q-sort is advantageous to traditional Q-sort and can be completed with basic survey creation software that contains advanced skip logic capabilities.

Research context

Adaptive Q-sort was implemented for a software product that was early in its product life cycle and had relatively high switching costs (time, effort and financial resources) for its customers. To meet company objectives for growing revenue and market share via new customer acquisition, the management team wanted to examine how to improve their software with the specific goal to acquire customers of their key competitors.

From a product life cycle perspective, the original software product started off by being a database software solution with basic features. As time progressed, managers of the software product became conflicted over the software's current and future roles. For example, some managers argued that the software solution should stick to its current capabilities (a database software solution) and just improve them. These managers argued that more specialized software solutions existed and could be integrated with their software solution. Anecdotal evidence suggested that a group of customers agreed with these managers. Yet other managers argued that the current role should be expanded to include these new software features and to become a one-stop software solution for customers. Here again, anecdotal evidence suggested that a group of customers wanted current software capabilities to be greatly expanded and to include these new software features. For this group of customers, it was unclear as to which features were most preferred.

High switching costs associated with this software also influenced the research process. Given their insight into the marketplace and the influence of high switching costs, management only wanted to pursue proposed features that were not being addressed or performing well in competitive software solutions. This was critically important to the management team.

In light of their current situation, the researchers expected that some of the proposed features would be irrelevant to certain customers. For these reasons, traditional Q-sort was ruled out. The researchers also discussed implementing maximum difference scaling but they thought that it would take too much time and effort from customers.

Research methodology

To meet the research objectives, adaptive Q-sort was developed and implemented using advanced skip logic within Qualtrics survey software. In the adaptive Q-sort exercise, it started by introducing and explaining the proposed software features so that respondents would understand their meaning and application. Respondents were then asked to identify those software features that their current software solution already performed "very well." If the software feature was selected, then it was removed from the adaptive Q-sort exercise. If the software feature was not selected, then it was carried forward into the next step of the adaptive Q-sort exercise. At this point in the adaptive Q-sort process, proposed software features were removed from the exercise if the feature was performing

Table 3

	No Preference	Mean Preference Scores
Achievement A	17%	4.82
Achievement B	30%	4.61
Achievement C	18%	4.57
Achievement D	27%	4.53
Achievement E	13%	4.47
Achievement F	35%	4.36
Achievement G	44%	4.21
Achievement H	13%	4.11
Achievement I	14%	3.64
Efficiency A	17%	3.57
Efficiency B	12%	3.47
Efficiency C	51%	3.15
Efficiency D	37%	3.02
Efficiency E	15%	2.96
Efficiency F	38%	2.94
Efficiency G	15%	2.20
Average	25%	3.79

"very well" in their current software or if the feature added "no value" to the software.

The survey then asked respondents to confirm their prior choices. For example, "Earlier, you selected the following features that your current software is performing very well. Is this correct?" On the next page, the following question was asked: "Earlier, you chose the following features that would add no value if added to your current software. Is this correct?" Finally, customers were presented with proposed features that by the process of elimination should add value to the software and they were asked to confirm that these features indeed would add some value if included into their software. If these three questions were confirmed, the respondent then went into the Q-sort exercise. If these questions were not confirmed, then the customer was removed from the database. Implementing this approach, the researchers were confident that each customer's Q-sort exercise would only include features that were relevant for that individual.

The survey was pre-tested with managers as well as a small number of actual customers. After a number of revisions, the final survey was sent via e-mail to 3,000 respondents, who were all end-users for this type of software. The e-mail invitation contained a password-protected link to take the survey. From this activity, 2,428 e-mails were successfully delivered and 622 respondents started the survey. After rigorously cleaning the data, 490 respondents with complete and quality answers remained in the sample, for a clean response rate of 20 percent.

Preference points were then assigned to the customer's actual survey choices. See Table 2 for how the researchers gave preference scores to customer selections concerning the proposed features.

Results

Due to the sensitive nature of this research, the author has disguised the actual name of the proposed software features. There were basically two types of software features. One type of feature dealt with achievement, while another type of software feature dealt with efficiency. Thus, the software features are named in this article Achievement A through I and Efficiency A through G.

Proposed software features with no preference. Given the survey logic implemented for each software feature, the analysis started by examining the percentage of customers who placed "no preference" on the proposed software features. For ease of interpretation, "no preference" scores are the combined percentage of customers who stated that their current software is already performing these features "very well" or the feature adds "no value." Table 3 suggests that on average, 25 percent of customers placed "no preference" on the proposed software features, with the range of features having "no preference" being from 13 percent to 51 percent. The majority of customers (85 percent) selected at least one software feature as having no preference, while only 2 percent of customers placed no preference on all proposed software features.

Management's assumption that many of these proposed software features would be irrelevant to a large number of respondents was correct. Thus, the decision to implement adaptive Q-sort was justified. For example, over half of the survey respondents placed no preference on the proposed feature Efficiency C. If traditional Q-sort had been implemented, these respondents would have been forced to place some preference on this feature, when in fact there was none.

Preference scores. The preference scores for the proposed software features range from 2.20 to 4.82, with an average preference score of 3.79 (Table 3). Overall, there is good variation in the preference scores. Clearly, the marketplace strongly prefers the Achievement software features as compared to the Efficiency features, as all of the Achievement software features have higher preference scores than the Efficiency features.

Interesting to note, some of the features that had a large percentage of customers stating "no preference" also had relatively high preference scores. For example, the Achievement B feature has a higher than average percentage (i.e., 30 percent) of "no preference" yet this feature has the second-largest preference score. Likewise, Achievement G feature has a much higher than average percentage (i.e., 44 percent) of customers stating "no preference" yet also a higher than average preference score. For both of these features, there is a relatively large percentage of customers who place no preference at all on these features yet other segments of customers place much higher than average preference on them. In contrast, Efficiency G has a lower than average percentage of customers who place no preference on this feature yet Efficiency G also has the lowest preference score. This suggests that customers have widely varying preferences for these features and that different preference-based segments may exist in the marketplace.

Advanced analysis

While discussing more advanced analysis in detail is beyond the scope of this article, it is important to note some advanced analysis results to demonstrate the usefulness of adaptive Q-sort. Advanced analysis consisted of preference-based segmentation and competitive analysis.

Concerning preference-based segmentation analysis, three segments were discovered after conducting latent class cluster analysis. In short, there were two different types of achievement segments, with both placing significantly different amounts of preference on different achievement features. In addition, there was a smaller efficiency segment who placed higher preference scores on the efficiency features relative to the achievement features. Preference-based segmentation analysis helped the management team to better understand different groups of customers and what combination of features might be bundled together to meet the needs of a specific segment.

Competitive analysis also proved to be quite interesting. In this analysis, the researchers examined preferences for customers of each competitor. For some key competitors, their customers had significantly different preference scores for different software features. Once this analysis was completed, the researchers then conducted CX analysis for each group of competitive customers, with the end result being a "likelihood to defect" index score. In short, competitive analysis examined which competitive customers were most likely to defect and then which new software features their customers preferred most. The key takeaway from this analysis suggested that different strategies would result for targeting different competitive customers.

Limitations and future research

As with any method, there are limitations that need to be addressed in future research. While the researchers were pleased with the results, future efforts should examine possible improvement opportunities. For example, respondents were presented with a long list of proposed software features to start the exercise. After introducing and describing these features, customers were then asked to select the features that their current software solution already performed very well, followed by which software features added no value if they were added to their current software solution. For the first question, 16 software features were listed. Were too many features presented at one time? Should a smaller number of features have been shown for each question? In short, what is the optimum number of features that should be shown to a customer at one time?

In our research study, features that were already being performed well by a key competitor were removed from the Q-sort exercise. Given the nature of the software and the industry, this approach worked for this specific situation yet this approach is not generally recommended.

Overcomes the assumption

The purpose of this article was to demonstrate the implementation of adaptive Q-sort as an alternative approach to traditional Q-sort and maximum difference scaling. In short, adaptive Q-sort overcomes the assumption that all features in the exercise are relevant and important to all respondents. In this research study, all features were not important to all respondents, as demonstrated by 13 percent to 51 percent of respondents placing "no preference" on the proposed software features. If researchers have reason to believe that some of the features would not be relevant to customers, then adaptive Q-sort should be implemented. As demonstrated earlier, the preference scores for adaptive Q-sort would be more valid and accurate as compared to traditional Q-sort. It is important to note that adaptive Q-sort does not require proprietary software and can be used with any survey software that allows for advanced skip logic.

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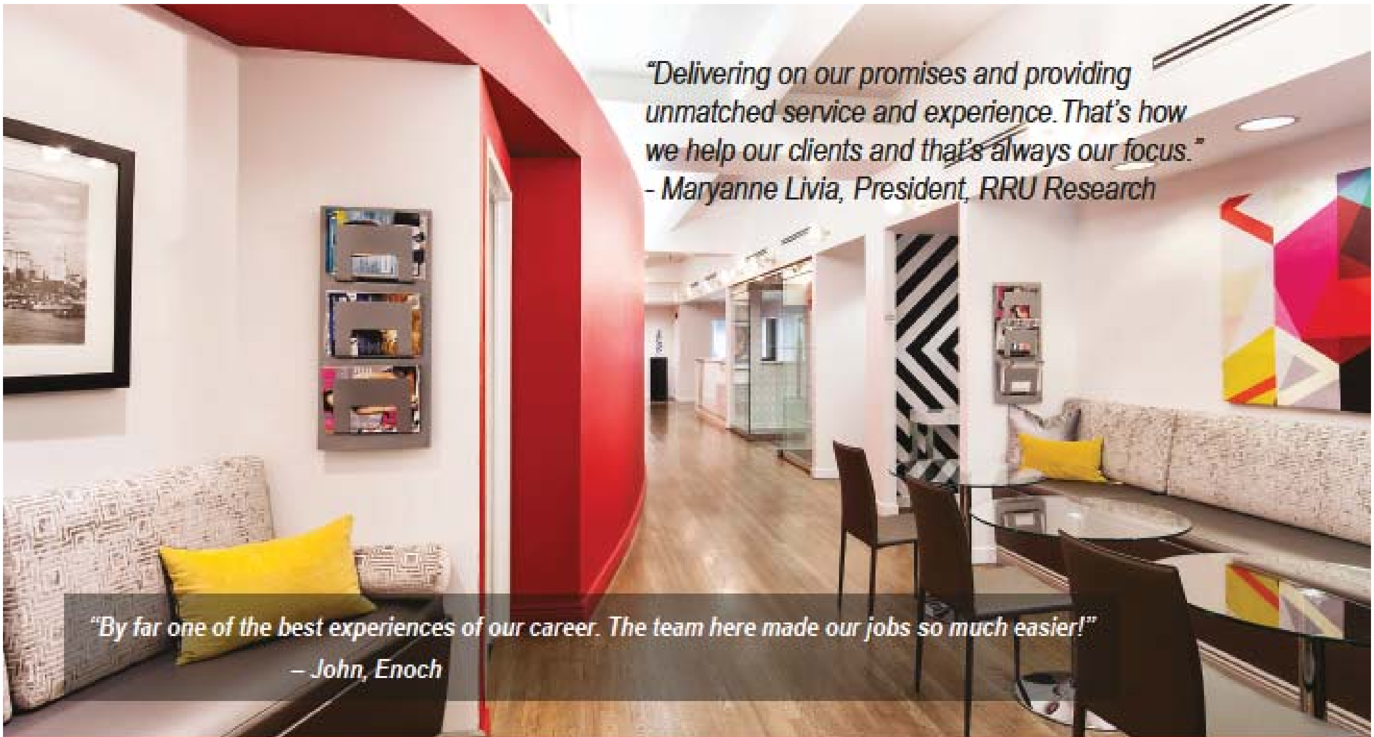

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Deep-seated and long-lasting

Memory's role in creating the future of brands

| By Eldaa Daily, Amy Shea and Charles Young

snapshot

A comparison of findings from 2009 and 2017 studies sheds light on the nature of advertising, memory and brand-building.

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Memory has been and remains a favorite topic of Hollywood, for good reason. It can act as a powerful and dramatic plot device, setting up severe obstacles in films such as *The Bourne Identity* and *Memento*. And it functions simultaneously as a character study. It dramatizes the question, "If I can't remember myself then who am I?"

Consider this exchange, from the film *Regarding Henry*:

Henry: No thanks, I don't like eggs.
Rachel: Eggs are your favorite!
Henry: Okay, then give me lots of eggs.

In *Regarding Henry*, Harrison Ford's character – his way of behaving and responding to life – takes a dramatic shift when he loses his memory. Not knowing who he was, he does not know who he is. He is left without a story about himself and he must now write a new one – with nothing to go on.

We tend to think of memory as a kind of record-keeper of the past. However, it is actually memory that informs our image of who we are in the present and has a tremendous impact on decision-making that affects our future. It is up to memory to enable the brain to make predictions about the possible consequences of future behaviors. From an evolutionary survival standpoint, memory is all about the future.

And, as it turns out, it's also about the future of brands.

Brand success is often connected to well-used measures like share-of-market and share-of-voice. And they are, indeed, useful measures. Share-of-market is a measure of brand results, an output. Share-of-voice is a measure of brand effort, an input. The value of a share-of-voice metric lies in its ability to predict share-of-market.

But exactly how does one aggregate and calculate the "share-of-voice" for your brand's advertising investment if it's spread across Amazon, Google, Facebook, Instagram, Twitter, television, print, banner ads,

outdoor, radio and all the other emerging brand touchpoints available to modern marketers?

And how does one account for the contribution to sales from the increasing variety of advertising formats deployed across all these media choices – from six-second Facebook ads to three-minute videos on an Amazon sales page?

Most importantly, share-of-voice calculations often leave out the impact of the quality of the content, i.e., the creative – the key variable which, according to many quantitative marketing models, explains more than half of the variability of in-market results.

This brings us to the importance of measuring that quality and the role of memory in how researchers might differentiate the most effective brand communications from those that have little or no impact.

Shift the demand curve

When a company invests in advertising it is not just trying to drive short-term sales transactions. It is buying a stream of future profits. The best of this kind of advertising builds brands that shift the demand curve to a higher level of profitability.

At its best, evaluation of brand advertising tries to help brands predict future sales. All advertising researchers have developed numerous ways of measuring success, whether evaluating it against another execution, campaign or an average, but understanding branded communications cannot stop there.

Since memory has such an impact on the "present" self who is making decisions, it follows that memories that self has of a brand represents a kind of equity – for better or worse – impacting decision-making and, thus, a brand's future. Understanding more about the effects of brand memory on brand-building must be part of our understanding if we as researchers are to reflect the real processes of the human mind.

Our view is that marketing a brand is, at its core, about memory.

Like the Japanese game of Go, the object of which is to capture more territory on the board than your opponent, the object of building brands is to capture more positive memory space devoted to you in the mind of the consumer than do your opponents.

Professor Byron Sharp, author of the successful marketing book *How Brands Grow*, writes about a similar concept in his discussion of mental "availability" as the key to brand success.

The idea that the story people carry in their minds about a brand, or even that they had given precious memory space to a brand at all, has been thought of before. In fact, it was the basis for a widely-accepted measure of success in the beginning of ad-testing days: recall. It was abandoned as lacking predictability to sales.

This is not surprising when understanding how memory works – a subject we researchers know a great deal more about today.

We now understand that the ad memories researchers want to access in our visual-drenched world are non-verbal and often difficult, if not impossible, to put into words. Asking someone if they remember an ad is not at all the same to the human mind as showing them an image from an ad and asking if they recognize it. This visual cue taps into a memory retrieval process far more graceful and reliable than the verbal "search" function of the brain.

Perhaps most important, however, is that new there is well-established science that demonstrates memory is far more nuanced then we previously understood. There are three major memory systems in the brain, not just one: semantic, episodic and procedural. When asking about an ad verbally, one is querying the semantic memory system, the one of the three systems weakest in its connection to emotion.

The episodic memory stores felt experiences, the "episodes" of one's life that one draws on for decision-making – from the smallest to the largest things. Accurate emotional measures are needed to understand what made an impact in any brand's communications, as most advertising researchers acknowledge.

To understand procedural memory, think of how you know how to open a door or eat a meal or perhaps drive a car. This is the place that physical rehearsal resides and it's vital to our survival. It turns out that rehearsing a brand experience through advertising activates mirror neurons in our brain and can become a part of our procedural memory. This has been studied intensively and used in behavioral psychology to help humans heal.

Therefore, with our practice of querying memory through visuals and seeking to understand which of the three systems are triggered, we were led to what we felt was a next-wave question, and study, of branded communications:

If in advertising research one can identify the most powerful visual branded memories, and can attribute them to a particular memory system, can we then confidently predict that those are the visual moments, whatever the memory system, that are building brand equity for the long game?

"If in advertising research one can identify the most powerful visual branded memories, and can attribute them to a particular memory system, can we then confidently predict that those are the visual moments, whatever the memory system, that are building brand equity for the long game?"

The research

To advance the body of knowledge in the field of branded memory, Ameritest and our sample partner, Research Now, operating under the aegis of the Advertising Research Foundation, recently conducted a study of long-term advertising memories in the quick-service restaurant category.

Nine years had elapsed between the time these fast-food ads were aired, and tested, in 2009, and when we went back, in 2017, to measure them again. We wanted to discover which, if any, advertising memories from that time still remain in people's memory. And, importantly, to see if those powerful visual moments identified in that 2009 research had any connection to what was remembered.

2009: QSR category ad sweeps

In 2009, Ameritest was operating a syndicated ad-testing service in the quick-service restaurant (fast-food) category. That year we tested all of the 30-second TV commercials that aired nationally in the QSR category. There were 268 adult targeted ads for 17 national brands, including McDonald's, Burger King, Pizza Hut, Sonic, Wendy's, etc.

The timing for this, our baseline year for our new study, was serendipitous. That year was shortly after the birth of social media, and Facebook and Google advertising were not yet significant factors in the media mix for fast-food advertisers.

Each commercial was tested among 100 fast-food consumers the week it first aired – so the sample for this baseline study, recruited by Research Now, was 26,800 consumer interviews.

Each ad was tested with a standardized survey, lasting 15 minutes and including the topline measures of attention, branding and motivation. Importantly, as well as verbal diagnostics, it included our visual diagnostics: frame-by-frame measures of memory (recognition) and associated emotion (felt experience), which were collected about 10 minutes after ad exposure.

2017: Share-of-memory tracking

In May 2017 we conducted this new follow-up study among 5,500 respondents, again using Research Now, to match the category usage and demographic sample of the 2009 study (adjusted for aging of the original target audience).

The stimuli used in this long-term memory research study were the same 4,050 (unbranded) still images originally pulled from all 268 ads for the 2009 ad tests and used in the original visual diagnostic testing. Each respondent saw a sub-sample of these visuals, drawn at random.

Respondents were asked if they recognized seeing each image before in any fast-food advertising, and if so, with which brand they associated that image.

Requires more study

This does not pretend to be anything other than the beginning of our mutual deep-space journey, exploring what impacts longer-term brand memories. This work, as we knew it would, requires more study to be carried forward by the industry as a whole.

What we did learn is that nine years after exposure, the average recognition level of images that appeared in fast-food advertising in 2009 was 12.5 percent. Importantly, we also found that images remembered and in the top quartile for positive emotion in 2009 were recalled at an even higher rate (17.2 percent) than the average in 2017.

This indicates that emotion plays a role in what makes it into long-term memory, contributing to brand equity. This is not surprising, given the significant amount of work done by the research community in the study of the power of emotion in advertising to drive decision making, and fits with our own data as well.

When examined through the lens of brand, we calculated the share of ads on air each of the QSR brands had in 2009 (a surrogate for media spend, as we didn't have that data) and then examined the share of memory by brands – in essence, the brand attribution of those remembered images.

The big winner was Sonic. The brand has kept to its visual iconography in its advertising through the years, featuring two people conversing and eating in the front of a car. While the people, products and dialogue in the ads changed, and thus the ads are different, this consistent approach became an equity for Sonic. This indicates that consistent visuals can be kept in memory and help create stronger brand connections.

McDonald's suffered the most from poor branding, with its share-of-memory less than its share of the ads it had on-air.

The study outcomes have some strong indications, which can contribute to hypotheses to explore in ongoing research:

- This study indicates that the effects of powerful advertising do not decay as quickly as we may have imagined.
- Quality communications – as measured using a comprehensive visual, verbal and emotional research methodology – appear to have a long tail when it comes to being worth keeping in memory.
- Poor branding in the short-term appears to create misattribution to other brands in the long-term. Even if those category memories are kept, other stronger brands may get the credit.
- It appears that two memory systems dominate the longer-term space: the emotions of the episodic system and the rehearsal or physicality of the procedural memory. The semantic, or verbal, memory system may contribute the least, depending on the category.
- Branded communications that decay more slowly in memory can be reasonably hypothesized to make a greater contribution to sales over a longer period of time. This, in turn, would result in a greater return in the original advertising investment.

Understanding success

When focusing on aggregating images and their memories, we are no longer restricted to focusing on traditional "ads." Visual-level assessment is what is required, as a very first step, to understanding success and branded memory deposits.

The long-term brand memory study reported in this article was about television advertising. Today, that view would be far too limited and unrealistic. For advertising running this year, the individual images used in the study would come from any kind of visual branded communications format, running on any platform, in any country.

This initial work makes the case for the closer examination of a shift to visual-based tracking systems if one is to understand what brand memories are being filtered for and found meaningful in the long game of brand-building.

Images are now the "facts" of what your consumer is remembering. This is the visual language we are speaking today and, as it turns out, we are all wired for it.

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snapshot

Frank Buckler outlines an approach to ad research that uses copy testing, ad profiling and AI-powered key driver analysis.

••• advertising research

Determining what works and why

Using universal structure modeling for ad research

| By Frank Buckler

Countless studies show that the money spent for advertising itself only explains 25 percent of market impact (ARF 2016). The remaining 75 percent of variations are due to the creative content of the advertisement or campaign. There are numerous ways to address this question through research. All of them, however, have significant limitations. Because of these limitations, the majority of ads perform below expectations. Even when an agency produces a top-performing ad, in most cases it can't easily replicate this success.

Most brands test creative ideas in pre- or post- copy test surveys. Quantitatively, they measure how well creative content performs. The surveys ask respondents for explicit qualitative and quantitative judgments. Typical questions include "Why did you like the spot?" or "What made you remember the brand?" These kinds of qualitative questions are supposed to measure why a commercial or other marketing vehicle does not perform well. Researchers compare successful advertisements with unsuccessful spots and try to identify properties that are obviously different. In practice, though, there are always multiple

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properties that overlap and cause variations. Objectively, there is no way of reliably pinning down the reasons for success with descriptive or correlation-based data analysis. It is a good exercise for generating hypotheses but it does not provide reliable knowledge.

Even brain-scanning (fMRI or EEG), facial recognition, eye tracking or implicit association testing do not solve the problem. Those methods more reliably measure the responses to advertising. What still is unsolved are these two questions:

1. What is the causal impact of emotional and attitudinal responses to outcomes?
2. Which of dozens of creative tactics and techniques within an ad has which impact on responses in which conditions?

Question one needs to be answered in order to make recommendations more reliable. Answering question two will make recommendations much more tangible and enable us to avoid ambiguous recommendations – which would be expected to better translate into market success.

To answer these and other important ad-effectiveness questions, we need to measure the impact that emotions have, the influence that creative techniques have and we need to measure their effect in a controlled, causal manner to be sure that the insights generated will be useful. An approach we've developed consists of three components: copy testing, ad profiling and AI-powered key driver analysis.

Copy test. In online surveys, we tested hundreds of commercials in different product categories. We measured the instinctive emotional response to an ad; we measured with implicit measurements how the ad is perceived and how attitudes toward the brand changed. Further, we assessed the impact on awareness, learning and purchase consideration. We designed the questionnaire to not just be applicable for TV commercials but any other advertising format and any other product category.

Ad profiling. Along with the copy test, which measures a consumer's response, is it important to understand what exactly influences those reactions. This is why we conduct a content analysis. In this, experts quantify all creative elements of an ad using a codebook of nearly 200 codes. First, we categorize which overarching emotional schemes are used, e.g., Disney equals "family love is most important," Nike equals "tenacity leads to success," banks equal "we are your friend," etc. Then we code which creative vehicles (such as celebrities, music or spokespersons) are leveraged. If we can understand which of those very specific creative components work, creative teams will be more successful in translating recommendations into effective ads.

Key driver analysis based on AI. The impact of creative components and tools cannot directly be read in data. Simple correlations and comparing figures can produce spurious findings. What it takes is a causal key driver analysis. For that, we leverage a self-learning, AI-based methodology to better explain why customers buy.

Particularly, we apply the universal structure modeling (USM) methodology, a technique that has been widely scientifically published (see the list of references at the end of the article). The method builds on the idea of PLS-path modeling but instead of conventional linear methods, it leverages machine learning in the form of a Bayesian neural network. With this, it can be flexible in how it sees variables relating to each other instead of assuming linearity, independence of drivers and perfect distribution properties. USM also comes with simulation techniques that eliminate the black-box property of neural networks. (If an implementation of USM is not available, one could still use PLS-path modeling or Bayesian networks from standard software packages to receive useful results.)

Aspirations were high

Our aspirations were high when we started researching the creative drivers of advertising in six different product categories: food, spirits, home décor and accessories, OTC medications, insurance and banking. We performed online copy tests of over 500 commercials. The ad profiling revealed first that in a category only about 30 to 40 out of 130 emotional triggers are commonly used and it was the same with creative vehicles – every category has two or three techniques that are used in over 80 percent of spots.

Reviewing the performance KPIs of the copy tests, we found a similar takeaway in every product category: An ad should be liked (the implicit associations with the ad are positive), linked to the brand (otherwise customers will not know what to buy) and it is beneficial if viewers state that they learned something from the ad. The most interesting finding was that positive emotions are mandatory to make consumers learn a rational message.

In addition, we found that:

Positive emotions are the key for driving impact. Positive emotions are not just productive but mandatory to make consumers process your ad. Just as important, three types of negative emotions – anger, contempt and disgust – must be avoided at all times.

Overall, the emotional connection turned out to be an essential element of the advertising instead of just a desired final outcome. Emotions are a response to emotionally-relevant content. Producing content that has emotional value to the consumers makes them listen to it and remember it.

The big question still is what kind of emotion drives sales. By measuring the impact of Paul Ekman's seven emotions on purchase intent, we found a pattern that is valid for all product categories: A commercial needs to leave its audience happy. Surprise is an emotion that is effective in getting to happiness but potentially negative emotions need to be handled with care.

Many award-winning commercials emotionally engage an audience but they do so by leaving the viewer sad (e.g., you feel sorry for someone in the story) or frightened – neither of which will effectively drive sales. Also, anything that creates feelings of disgust or contempt will kill an ad's performance. And it's not the type of obviously distasteful situations one might think of; even scenes where actors grab wet, used tissues or where they consume food which the audience doesn't like can make viewers respond with disgust and can turn them off of ever buying the advertised product.

It pays to go against the current. The emotional triggers (the overarching emotional messages of a spot) that are most-used in many product categories typically don't work! The triggers that do work are believable and have a simple and direct link to what the advertised brand can do for the customer emotionally.

Interestingly, what is emotionally relevant to customers is not always what you would expect and we found in some categories that the two or three most commonly used emotional triggers are ineffective. For example, banks mostly advertise that they are a trustworthy "friend." Pharmaceuticals promise relief. And liquor brands promise they'll help you have a great time in the company of others. All of those emotional values make perfect sense but unfortunately are measurably not effective yet they are used in most ads.

Instead, we found for OTC pharmaceuticals that brands need to step out of the comfort zone to drive impact. Ads that use the "loser" trigger – where someone in the spot has exaggerated misfortune or clumsiness – are consistently outperforming the industry. The technique triggers the physiologically measurable type of happiness called *schadenfreude*, which makes the viewer feel superior, sending them the message "Don't be one of those losers who doesn't take the right medication." Well-applied, it is a goldmine.

For banks, it might be true that they need to gain trust but this is not achieved by claiming trustworthiness. A more effective emotional trigger here is to use "family love," to show that the services are serving the most important thing customers care for – their loved ones.

Also, with spirits brands, most people would agree that the spots that claim the brands deliver "a great time in company with others" work well. But evidence shows something else. You can have fun with friends with any kind of drink. Instead, consumers choose brands simply because they are expecting some indulgence.

Old-school works. Creative agencies are driven by the search for the new and the cutting-edge. But our studies have found that many fashionable new tactics can hinder ad effectiveness while many old-school approaches are true performance boosters. Further, we have found that simpler is often better, especially with creative elements in ads. Commercials typically use music to engage the viewer emotionally yet many use meaningless, unrelated soundtracks that fail to make a difference. Even worse is when brands try to educate and convey a message using ineffective vehicles such as metaphoric storytelling, text and voiceover techniques. And while many brands leverage celebrities, we have found that it often harms the performance of ads. Celebrities need to be closely associated with the brand otherwise they can distract attention away from the brand and fail to support brand-building and brand-recall.

A key question in advertising is: How can we ensure that the audience gets our message? Will they see that we are cheaper, work better, will make them slimmer, etc.? Again, the evidence in this study is a call for simplicity. If you want to convey a message use the simplest and most direct way to bring a message across: put a spokesperson on-screen who looks into the camera and tells the viewer very briefly what needs to be told.

Music is known to drive emotional engagement. But what we found is that a simple technique will let a commercial outperform its peers: Use a well-known song that has lyrics which correspond to the commercial's message. For example if your spot is about enjoying a nice day in spring, use the hit "I Can See Clearly Now" for its references to "bright, sunshiny days."

Everyone can use this approach

The relevance of the new approach is obvious. Suddenly, we are able to set stricter guidelines for creatives in their work. Comparable results can be achieved by anyone without our help. Many research companies offer emotion-based copy tests. With some effort every brand can develop its own coding framework with 20 percent effort that covers 80 percent of content. Finally, the AI-based key driver analysis that we recommend is scientifically published and available to the public as well. Even the use of conventional key driver analysis would be better than using descriptive- or correlation-based approaches.

The clients that funded this multi-client-multi-category study now use results in multiple ways:

- Copy test: They use the applied copy test for future assessments. The driver model built in this study is applied to this new data to arrive at more specific recommendations.
- Deep-dive modeling: Some clients now extend the study with in-market-success data. In this way you can model the algorithmic relationship between creative tactics and short- and long-term sales figures.
- Alignment workshop: All this knowledge must be translated into creative briefings that will end up in more powerful ads. With the studies' findings users can enable creative strategy workshops and enrich the discussion with spot examples out of a database of commercials that have been analyzed.

Have we been successful in identifying the DNA of successful advertising in our multi-category study? No, we did not find that Holy Grail. But at least we raised the bar and achieved insights with greater clarity and market impact.

Frank Buckler is founder and CEO of Success Drivers, a Santa Barbara, Calif., research company. He can be reached at buckler@neusrel.de.

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●●● health care research

A display of confidence

Enhancing forecast precision by simulating patient treatments

| By Roger Green

snapshot

The author reports on findings from a survey of 1,100 physicians to test the precision of allocation versus patient simulation.

Pharmaceutical marketing researchers today need to shrink budgets while simultaneously increasing forecast precision. The logic behind this paradox is simple: Increased precision drives better marketing decisions that grow revenues. Shrinking budgets decrease costs. Growing revenues and decreasing costs both improve corporate profitability.

The simplest way to improve precision is to increase sample size but this increases cost. To improve precision without increasing sample, we need to observe more events without increasing the number of interviews we conduct. One method that creates more observable events per respondent is treatment simulation. In traditional marketing research, researchers base each estimate on one allocation per respondent. In simulation, researchers can ask a prescriber to treat multiple patients and then create a sample for analysis based on the total number of treatment events.

This article describes a validation exercise comparing the precision of allocation versus patient simulation methods. These results suggest that treatment simulation can improve precision while making more efficient use of sample:

- Adding treatment of four simulated patients to a forecasting study will reduce variance in 87 percent of studies compared to utilizing estimates or allocation methods. Adding treatment of eight patients will reduce variance 100 percent of the time.
- For the average study, adding treatment of four patients will reduce variance by an average of 30 percent. Adding eight patients will reduce variance by 50 percent. For products with wide differences in use between prescribers, variance reductions increase to 39 percent and 62 percent respectively.
- In brands for which prescribers estimate their likely use consistently, adding four patients will allow you to achieve your target confidence level with two-thirds as many interviews as simple allocation. For a brand with inconsistent use estimates, adding eight patients will allow you to achieve your target confidence level with 20 percent as many interviews.

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The image above is a photograph of the 65” monitor currently showing 3 of the 5 cameras, and the simultaneous iPad screen. Camera 5 shows the test room as reflected in the one-way mirror.

Feature	West	North	East
Confrence Room	20x17	25x21	20x17
Tiered Observation Room	15x17	14x21	16x17
Viewing Seats	15	12	15
Fully Equipped Usability Lab	Yes	Yes	
Video Streaming	Yes	Yes	Yes
Separate A/C for Confrence & Observation Rooms	Yes	Yes	Yes
WiFi (Fiber Optic)	Yes	Yes	Yes

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Table 1: Sample Size by Specialty

Specialists	Sample
Endocrinologists	90
HIV specialists	100
Neurologists	90
Psychiatrists	90
Pulmonologists	90
Rheumatologists	100
Urologists	90
Total Specialists	650
Primary Care	450
Total Sample	1,100

More confident decisions

The ability of marketing researchers to provide precise forecasts is critical to decision makers. Tighter intervals produce more confident decisions in the form of product kills, in- or out-licensing or large investments. For example, a forecast that shows a 21 percent share estimate with a confidence interval from 20 percent to 22 percent will be far more valuable in supporting decision-making than a 20 percent share estimate with a confidence interval from 12 percent to 30 percent.

If we assume perfect measurement, the precision of share estimates is driven by two factors – the variability of the population and the size of the sample. Since the variability of the population is fixed, the only way to increase precision with a given research technique is to increase sample size. However, increasing precision by increasing sample comes with a steep price. To double your precision, you must quadruple your sample.

When estimating market share based on primary research, pharmaceutical marketing researchers typically ask each respondent to allocate the percentage of relevant patients to whom s/he will prescribe a given brand. The overall share estimate for that brand represents the average estimate across all physicians in the sample. Sample precision reflects the variability of physician share estimates and the sample size.

Patient simulation studies take a different route to estimating share. Each physician "treats" several simulated patient profiles using brands in the current market plus novel brands as depicted in target product profiles. Share represents the percentage of patients that received a prescription for the brand. Precision reflects the share and number of treatment events in the simulation. Since there are multiple treatment events per patient, it stands to reason that simulation will produce tighter confidence intervals than allocation.

Method

To test the relative precision of allocation versus patient simulation, RG+A conducted a survey with 1,100 physicians (Table 1) experienced with treating patients with one of seven diseases: Alzheimer's, COPD, Type 2 diabetes, HIV, overactive bladder, rheumatoid arthritis and overactive bladder. Each respondent provided first- and second-line allocation measures based on patients they had treated over the previous 30 days. To enhance the accuracy of allocations, we provided physicians with lists of major brands and required them to review the allocated shares side by side before proceeding further in the study.

The actual number of brand allocations made by respondents varied by disease (Table 2). Across all seven diseases, the study provided first- and second-line allocations for 109 brands, yielding a total of 218 allocations. To ensure that each allocation was sufficiently robust, we eliminated eight first- and second-line brands because fewer than 30 physicians provided allocations, thus reducing the total brands for comparison to 202. We added 24 more share allocations based on estimated use of new products. This provided the final total of 226 allocation measures.

Each brand allocation was evaluated in four separate Monte Carlo models. In the allocation model, the model estimate reflects the distribution of allocation results. In the simulation model, we estimated that a physician's actual prescribing would be proportionate to her allocation. For example, the model was built to assume that a respondent who allocated 25 percent for a given brand would prescribe that brand for 25 percent of patients. We then built three separate Monte Carlo models, one each assuming four, six and eight simulated treatments per respondent. In the simulation Monte Carlo models, we calculated brand share by counting the number of times the simulation showed the brand being used divided by the total number of patients treated. For all four Monte Carlo models, the process was repeated 1,000 times for each brand to observe the variation in estimated brand share (i.e., its precision).

Results

The first step in the analysis was to compare average simulated shares to allocated shares. Since the simulations reflected the allocated shares of physicians, one would expect the average simulated share to match each brand's allocated share. This was indeed the result. Across 678 brand simulations (i.e., 226 brands simulated at four, six and eight patient treatments), all average simulated shares were within one-tenth of one percent of average allocated shares.

Impact on precision

The precision of simulated shares was calculated from the results of the 1,000 runs conducted on each brand. This mea-

Table 2: Number of Brand Allocations by Disease and Specialty

Disease	Specialists	Primary Care	Total
Alzheimer's Disease	10	10	20
COPD	32	28	60
Type 2 Diabetes	18	18	36
HIV	42		42
Overactive Bladder	12	10	22
Rheumatoid Arthritis	14		14
Schizophrenia	18	14	32
Total Brand Allocations	146	80	226

Table 3: Sample Bonus from Patient Treatment-Based Estimating

		Patients Simulated					
		4		6		8	
Allocation Precision	Average Sample	Equivalent	% Bonus	Equivalent	% Bonus	Equivalent	% Bonus
Low	62	95	53%	142	129%	192	210%
Moderate	71	162	128%	242	241%	324	356%
High	74	292	295%	438	492%	588	695%
Average	70	184	163%	275	293%	374	434%

sure (the standard deviation of the 1,000 share estimates) was compared with the corresponding standard error of the mean for the corresponding allocation to see which was smaller (i.e., more precise). The relative size of the measures of precision was also compared to assess the amount of improvement.

In this article, we describe a method as "more precise" if it reduces the statistical error around the forecast attribute. The "percent improvement" refers to the reduction of the standard error (a 50 percent improved might take it from 5 percent to 2.5 percent).

The results suggest that estimating brand share by having physicians treat patients enhances precision over allocation methods. Estimating share based on four patients provided more precise estimates for 87 percent of the 226 comparisons with an average improvement of 30 percent (Figure 1). Increasing the number of patients treated to six showed greater precision in 98 percent of the comparisons with an average improvement of 43 percent. Adding two more patients for a total of eight resulted in every comparison being more precise with an average improvement of 50 percent.

Similar patterns of results were observed among key subgroups. Having physicians treat patients to estimate share had a consistent advantage across disease and physician specialty, and whether the allocation was for first-line use, second-line use or potential use of a product concept. The pattern also held across allocated brand share with simulation enhancing precision among low-share brands as well as high-share brands.

Impact by amount of allocation variability

This result clearly supports the position that overall, treatment simulation will provide more precise estimates than allocation methods. The next question was how the level of variability in the allocation estimate affected the relative precision of allocation and simulation. Physicians usually allocate shares for brands with smaller market shares or very specialized populations within a tighter range than brands with larger share and more diffuse opinions about for whom and how often they should be prescribed. The strategic value of simulation will be greater if it reduces variance most in those places where variance is highest.

For this analysis, we divided allocation shares into three groups based on the magnitude of their 95 percent confidence intervals:

- high-precision estimates (confidence intervals less than +/- 2.5 percentage points; 16 percent of allocations);
- moderate-precision estimates (confidence intervals +/- 2.5 to 5 percentage points; 59 percent of allocations); and
- low-precision estimates (confidence intervals more than +/- 5 percentage points; 25 percent of allocations).

As the precision of allocation measures declined and confidence intervals grew larger, the amount of advantage from treating patients increased (Figure 2). The effect was most pronounced in shares based on four treatments, where the precision advantage grew 3.6 times, from 13 percent with high-precision allocations to 39 percent for low-precision allocations.

Sample bonus

The practical significance of enhancing precision by treating simulated patients can be demonstrated by converting the advantage into sample bonus. Sample bonus is the amount of additional allocation sample that would be required to match the precision generated by treating patients. As an example, 90 primary care physicians provided an allocated share for a new drug to treat Alzheimer's disease. The estimate of share using four treated patients provided a 40 percent precision advantage. For the allocations to match this precision there needed to be an additional sample of 160 primary care physicians.

The sample bonus numbers comparable to the precision enhancements range from modest to eye-popping (Table 3). As one would expect, the bonuses were the smallest with high-precision

Figure 1: Impact of Patient Treatments on Share Precision

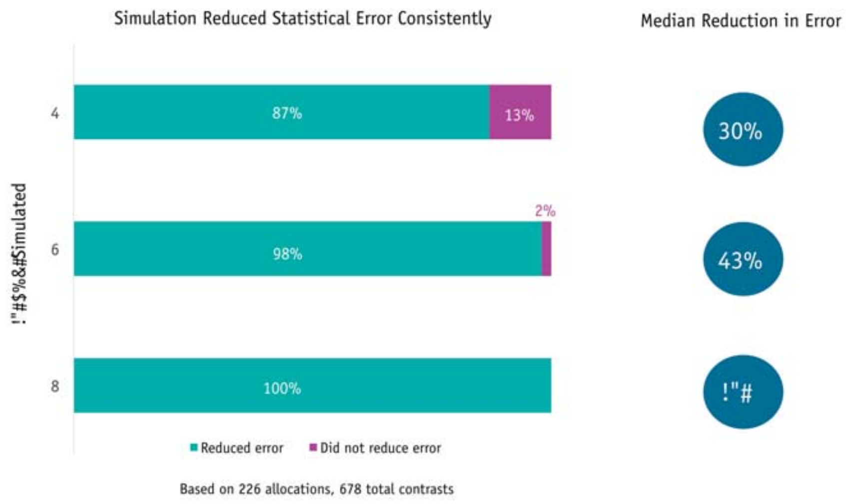
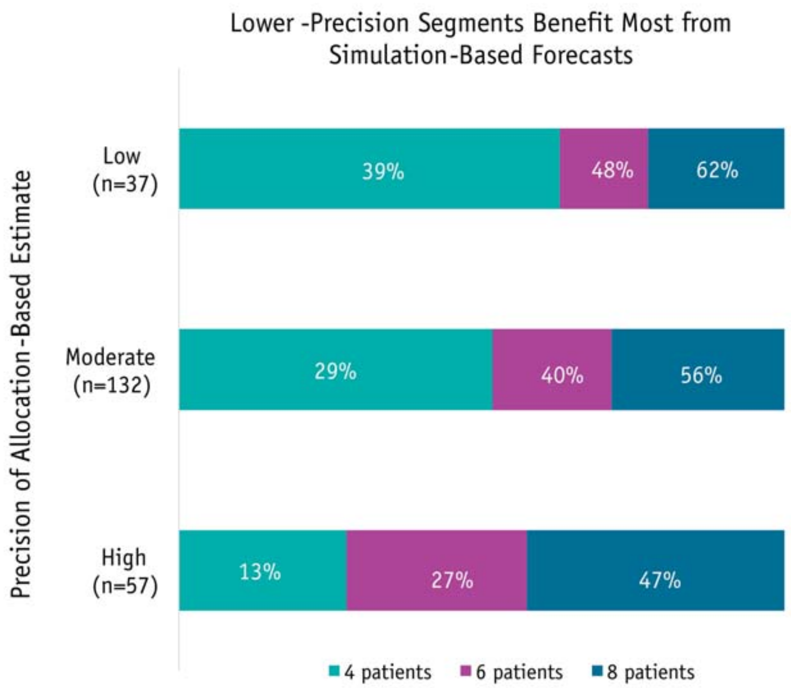


Figure 2: Impact of Patient Treatments on Allocation Precision Segments



brands ranging from 33 additional physicians with four patients treated to 80 with six treatment events and 130 with eight treatments. To put these numbers in perspective, the smallest bonus still represented a 50 percent increase in sample. In the less-precise segments where the bulk of the allocations exist, the bonuses ranged from 91 to 253 with moderate-precision brands and from 218 to 514 with low-precision brands. Given an average allocation sample in the 70 to 75 range, sample sizes would have to be two to four times higher to match treating patients for moderate-precision brands and four to almost eight times higher with low-precision brands.

More likely to be the right one

The precision of share estimates is an important consideration in marketing research. Share estimates directly impact many marketing decisions and lead to the investment (or non-investment) of millions of marketing dollars. When the cost of being wrong is more expensive than ever, more precise shares also mean the action chosen is more likely to be the right one. Confidence in forecasts is pivotal in allowing decision makers to choose a course of action and invest without hesitation or undue limits.

These results offer strong support that patient treatment simulation can provide more reliable information for decision-making by improving share precision dramatically. Treating as few as four patients improved precision by an average of 30 percent. Increasing the number of patients treated led to further precision improvements with six patients providing a 43 percent enhancement and eight patients providing a 50 percent enhancement.

The precision improvement offered by patient simulation can help marketing researchers squeeze more insight out of their already-tight budgets. Allocation methods require much larger samples – in most instances ranging from at least 100 to several hundred additional physician interviews – simply to provide the same level of precision as treatment-based estimates.

The number of brands, range of shares and class diversity of the brands studied suggest study results will be valid across most if not all drug classes and brands. The allocations came from seven different diseases and were provided by large, diverse samples of both specialists and primary care physicians. The 216 allocations studied represent first- and second-line brands as well as product concepts. The allocated shares studied ranged from the very small (less than 1 percent) to the very large (79 percent). It is highly unlikely that there are many, if indeed any, brand share precision examples that this research did not explore.

While it was not part of the current study, the results suggest measuring share by treating patients will provide benefits beyond forecasting. More precise share estimates increase the researcher's ability to detect change. In statistical terms, it increases power. This means there is a better chance that studies comparing two alternatives will detect real and important differences. It also means that research monitoring change will be able to detect smaller differences, providing an earlier warning of marketplace changes.

Roger Green is CEO/president of RG+A, a New Hope, Pa., research firm. He can be reached at rgreen@thinkrga.com.

••• data analysis

Removing the subjectivity

A better way to analyze geographies

| By Adam Cook

snapshot

Adam Cook explores the mass-propensity index for balancing population and propensity measures.

I was participating in a Webinar with a leading secondary research provider and had one of those "there's got to be a better way" moments when they shared example geographic opportunity reports. Included in the reports was one geographic listing with the amount of opportunity available (the population or mass) and the other was a listing of the same areas with a likelihood to purchase a specific product (the concentration, propensity or index). Without any hesitation the presenter continued to share how a business could combine these two sets of data to help identify the strongest and weakest geographic opportunities within a market. This is a challenge many businesses face; basically, picking and choosing which areas are at the top of each respective set of data. In this instance, it was choosing from a list of potential consumer population counts and a list of desired attribute concentration percentages. To have data in front of you and feel that you have to subjectively decide just didn't seem right to me. With that, I opened a spreadsheet, got to work and calculated a better way, because that's what research nerds like us do.

Using a basic example of zip codes within any given market with a secondary research resource, we can extract population or household counts and multiple demographic, expenditure or other consumer behavior attribute counts. This enables us to identify two distinct percentages: vertical and horizontal. The directional descriptions are used to understand the base of analysis in a basic crosstab report like the one presented in Table 1.

In this instance, the vertical percentage is simply the percentage of the entire market that falls within the zip code under analysis. As seen in Table 1: 0.02 percent of all households within the market with an income of $100,000 or more lives in zip code 12345 (26 of 157,718 households).

Conversely, the horizontal percentage is the percentage of that zip code that resembles the attribute under analysis. As seen in Table 1: 16.77 percent of zip code 12345 has a

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Table 1

Example Crosstab Report (First 10 of 188 zip codes included):

	Households		Households: Income $100K+		
Area	Count	Vert %	Count	Vert %	Horz %
Total Market	744,599	100%	157,718	100%	21.18%
Zip Code	Count	Vert %	Count	Vert %	Horz %
12345	155	0.02%	26	0.02%	16.77%
12346	185	0.02%	30	0.02%	16.22%
12347	775	0.10%	150	0.10%	19.35%
12348	73	0.01%	10	0.01%	13.70%
12349	219	0.03%	50	0.03%	22.83%
12350	107	0.01%	18	0.01%	16.82%
12351	8,112	1.09%	1,697	1.08%	20.92%
12352	989	0.13%	305	0.19%	30.84%
12353	271	0.04%	48	0.03%	17.71%
12354	4,637	0.62%	1,028	0.65%	22.17%

Figure 1

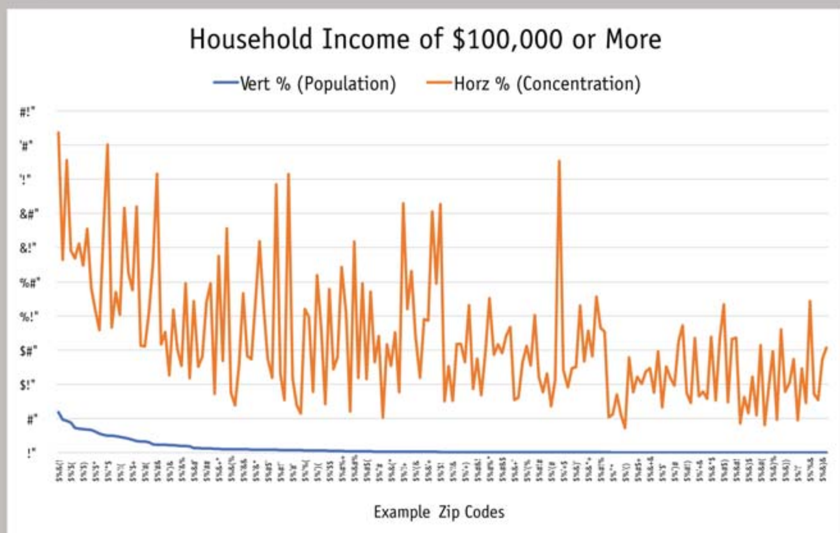


Figure 2

Horizontal Percentage Conversion Formula:

$$\frac{\text{Horizontal \%}}{\text{Sum of All Horizontal \%s}} = \text{Converted Horizontal \%}$$

household income of 100,000 or more (26 of 155 households).

A geography could have a high population count of an attribute (or vertical percent) yet have a lower-than-average concentration of that attribute (or horizontal percent), whereas another geography could conversely have a smaller population count but a high concentration of that attribute. Both present different geographic opportunities.

As a result, decision-makers feel bound to either subjectively favor the value of one percentage over the other, or literally guesstimate which geographies appear to be strong in both. Not very scientific to say the least – but there is a mathematical solution.

Step 1: Convert percentages to an equal field of analysis

Most people would be inclined to simply combine or average the two percentages available but this is problematic. The sum of vertical percentages for a set of geographies is bound to the maximum of 100 percent, whereas horizontal percentages can be much higher depending on the number of different geographies and the type of attribute included in the analysis. (The total sum of the 188 horizontal percentages used in the example equals 3,134.40 percent.) In this example, simply combining or averaging the two would unintentionally give greater weight to the horizontal percentages. See the example in Figure 1 to see how the distribution of vertical and horizontal percentages can vary for a geography including 188 different zip codes. You can see how it's a bit like comparing apples and oranges. There is a way to convert the horizontal percentages onto the same mathematical playing field as the vertical percentages (meaning, they add up to 100 percent) and maintain the integrity of the data's distribution within the set.

See Figure 2 for this conversion formula. See Table 2 for the updated converted horizontal percentages.

Note: We innately believe that that two different numbers or variables cannot be combined into one number (e.g., population count, percentages, rating, ratios, etc.). The reality is that most differing variables can be converted into a common form of vertical percentage.

To see that the integrity of the data distribution has remained intact, see Figure 3. When displaying the two different data sets on a chart with a primary and secondary axis, we can see that the distribution of the data sets is identical. Now see the updated chart in Figure 4 using the same axis of percentage for the vertical and converted horizontal percentages. Our problem of being able to make one objective decision

Table 2

Example Crosstab Report (First 10 of 188 zip codes included):

	Households		Households: Income $100K+			
Area	Count	Vert %	Count	Vert %	Horz %	Converted Horz %
Total Market	744,599	100%	157,718	100%	21.18%	3134.40%
Zip Code	Count	Vert %	Count	Vert %	Horz %	Converted Horz %
12345	155	0.02%	26	0.02%	16.77%	0.54%
12346	185	0.02%	30	0.02%	16.22%	0.52%
12347	775	0.10%	150	0.10%	19.35%	0.62%
12348	73	0.01%	10	0.01%	13.70%	0.44%
12349	219	0.03%	50	0.03%	22.83%	0.73%
12350	107	0.01%	18	0.01%	16.82%	0.54%
12351	8,112	1.09%	1,697	1.08%	20.92%	0.67%
12352	989	0.13%	305	0.19%	30.84%	0.98%
12353	271	0.04%	48	0.03%	17.71%	0.57%
12354	4,637	0.62%	1,028	0.65%	22.17%	0.71%

Figure 3

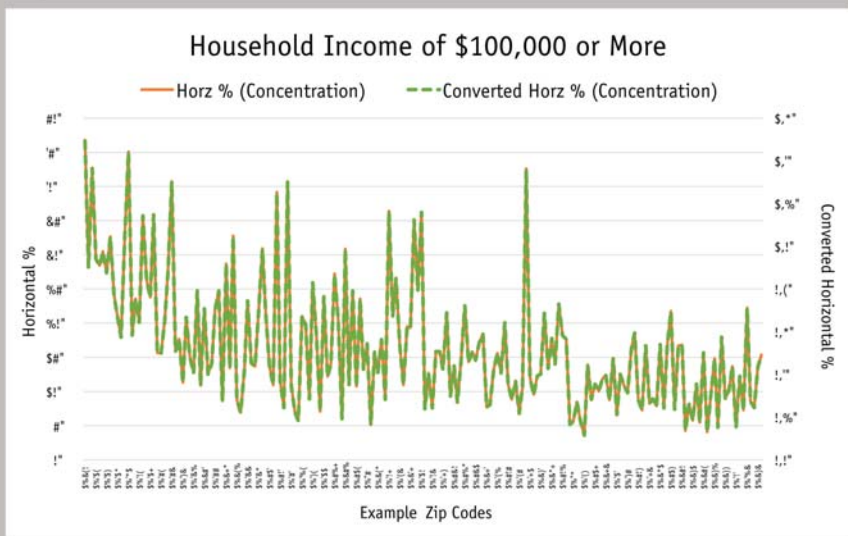


Figure 4

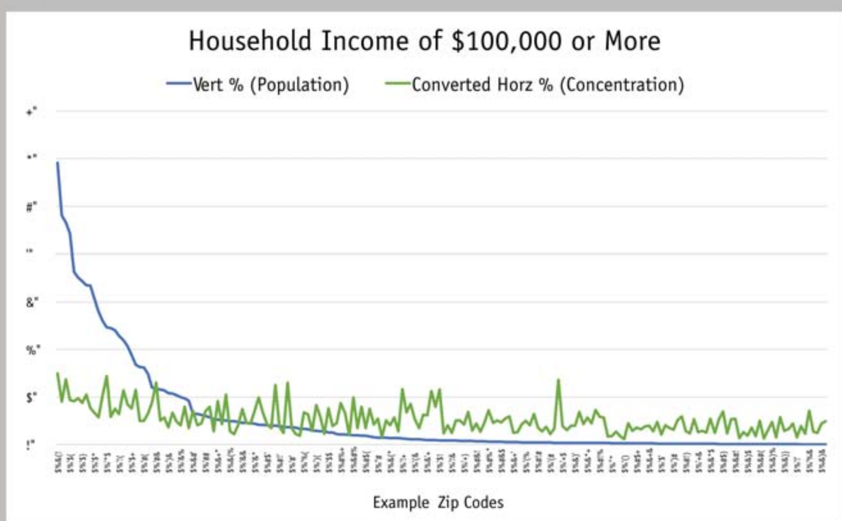


Figure 5

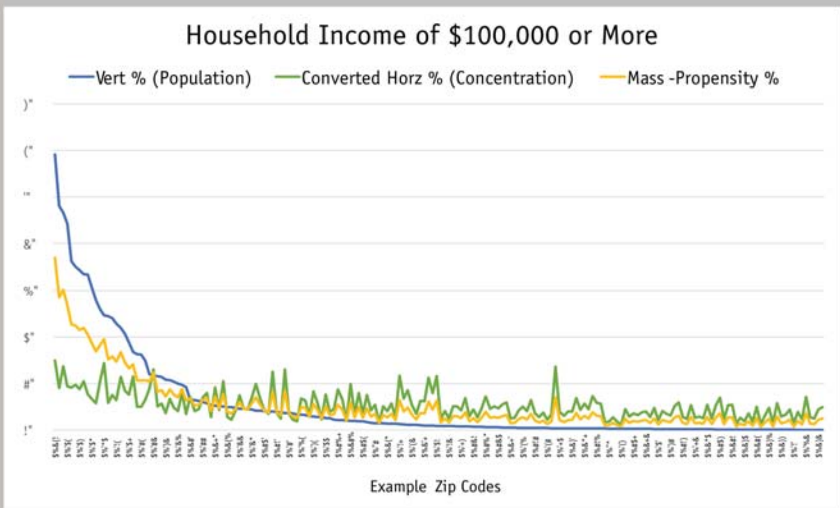
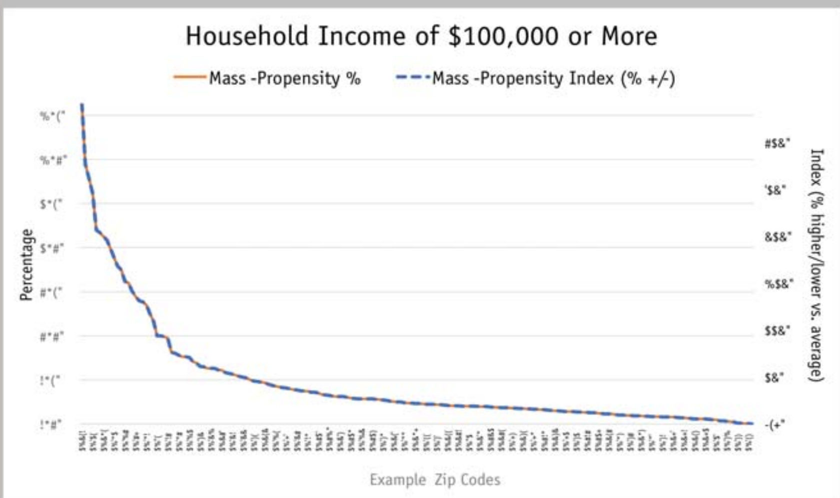


Figure 6



isn't solved yet but this is a crucial first step.

Step 2: Calculate the mass-propensity percentage

To calculate this, we simply average the vertical and converted horizontal percentages. This applies an equal weight for each percentage used. If a decision-maker had a specific weight they desired to apply to one percentage over the other, that can be applied to the equation (e.g., a desired 75 percent weight for the vertical percentage would be [(vertical percent x 75 percent) + (converted horizontal percent x 25 percent)] ÷ 2). Figure 5 demonstrates where our mass-propensity percentage would fall in relation to the vertical and converted horizontal percentages.

Step 3: Calculate and report using a mass-propensity index

Since people will likely struggle with defining what the mass-propensity percentage variables represent, I suggest adding one additional conversion. Most businesspeople can relate to an index (percent higher or lower), so here is the final step for calculating the mass-propensity index. First, calculate the average mass-propensity percentage for the entire region under analysis (0.53 percent, as seen in Table 3) and then calculate the percentage difference between each geography listed and this average. This shows us that the top mass-propensity percentage zip code was 596 percent higher than the average (3.70 percent vs. the average of 0.53 percent). Table 3 now gives you a mass-propensity index listing, which enables you to objectively rank the geographies by the count and the concentration of households. Figure 6 demonstrates how this final conversion from mass-propensity percentage to the mass-propensity index does not impact the integrity of the data's distribution. This form of indexing can be applied across all geographic levels (e.g., globally with countries; across the U.S. by regions, states, metros, cities, zips, census tracts, block groups, postal routes; or locally by smaller geographic definitions).

Table 3

Example Crosstab Report (Top 10 Mass -Propensity Index of 188 zip codes included):

	Households		Households: Income $100K+					
Area	Count	Vert %	Count	Vert %	Horz %	Converted Horz %	Mass - Propensity %	Mass - Propensity Index
Total Market	744,599	100.00%	157,718	100.00%	21.18%	3134.40%	100.00%	0.53%
Zip Code	Count	Vert %	Count	Vert %	Horz %	Converted Horz %	Mass - Propensity %	Mass - Propensity Index
12380	19,919	2.68%	9,323	5.91%	46.80%	1.49%	3.70%	596%
12420	17,208	2.31%	7,354	4.66%	42.74%	1.36%	3.01%	466%
12427	26,779	3.60%	7,580	4.81%	28.31%	0.90%	2.85%	437%
12418	23,661	3.18%	6,979	4.42%	29.50%	0.94%	2.68%	404%
12415	20,125	2.70%	5,727	3.63%	28.46%	0.91%	2.27%	327%
12366	18,149	2.44%	5,536	3.51%	30.50%	0.97%	2.24%	321%
12368	16,187	2.17%	5,291	3.35%	32.69%	1.04%	2.20%	313%
12419	19,728	2.65%	5,414	3.43%	27.44%	0.88%	2.15%	305%
12378	21,809	2.93%	5,267	3.34%	24.15%	0.77%	2.06%	286%
12461	8,613	1.16%	3,883	2.46%	45.08%	1.44%	1.95%	267%

Endless list of variables

While the mass-propensity index was devised for balancing population and propensity measures, these same steps for conversion can also be applied with other measures. For example, you can combine dollar volume and market share or dollar volume and growth or sales and customer satisfaction ratings to analyze geographies. You're also not limited to combining two measures. As a result, there's an endless list of variables and numbers of variables that can be combined. A little bit of math can go a long way in helping to reduce subjective business decision-making.

Adam Cook is the chief research nerd at CraniumTap in Norfolk, Va. He can be reached at 757-446-2664 or at acook@craniumtap.com.

questionnaire design

That could hurt

Why survey design is like pulling teeth

| By Alice Blackwell

snapshot

Alice Blackwell offers six reasons against non-researchers writing their own surveys.

Most people don't rely on their own personal knowledge of dentistry to conduct dental exams and treatments. Instead, they go to a dentist. Similarly, most businesses don't count survey design as a core competency but they often attempt to do DIY market research. The research industry has seen some truly remarkable innovations over the last decade, including online survey technology and other SaaS offerings which allow anyone easy access to the mechanics of survey creation. What these tools don't do, however, is teach the user how to write an appealing and scientifically-sound questionnaire, nor do they point out design issues with surveys created on the platform. There is no "survey check" that puts a squiggly red line under problematic question-wording or -formatting.

It's a specialized skill to be able to understand the analyses needed to accurately address the objectives, then envision the structure and type of data that will be required to perform those analyses.

The temptation of "cheap" survey access, plus lack of professional guidance, has led many organizations down a path fraught with peril and even caused some to make fatally flawed decisions. Most DIY survey platform users don't have enough training in the theory and practice of survey design to create an instrument that will yield the data they need to make optimal, informed decisions. There's nothing wrong with acknowledging that you don't understand all aspects of questionnaire design, just like there's nothing wrong with knowing that you don't know how to safely and painlessly extract your own tooth. Both are complex skills that require extensive training and tackling the job yourself is likely to lead to unintended (and quite possibly disastrous) results.

The DIY survey is especially rampant due to the sheer volume of surveys in modern life. Everyone is exposed to multiple, ongoing requests to participate: there's the survey request printed at the bottom of your retail receipt; the pop-up survey that appears on your favorite Web sites; the phone call from a pollster or market research agency; the sincere request from a charity to complete a mail survey; the list goes on and on. When the average person is

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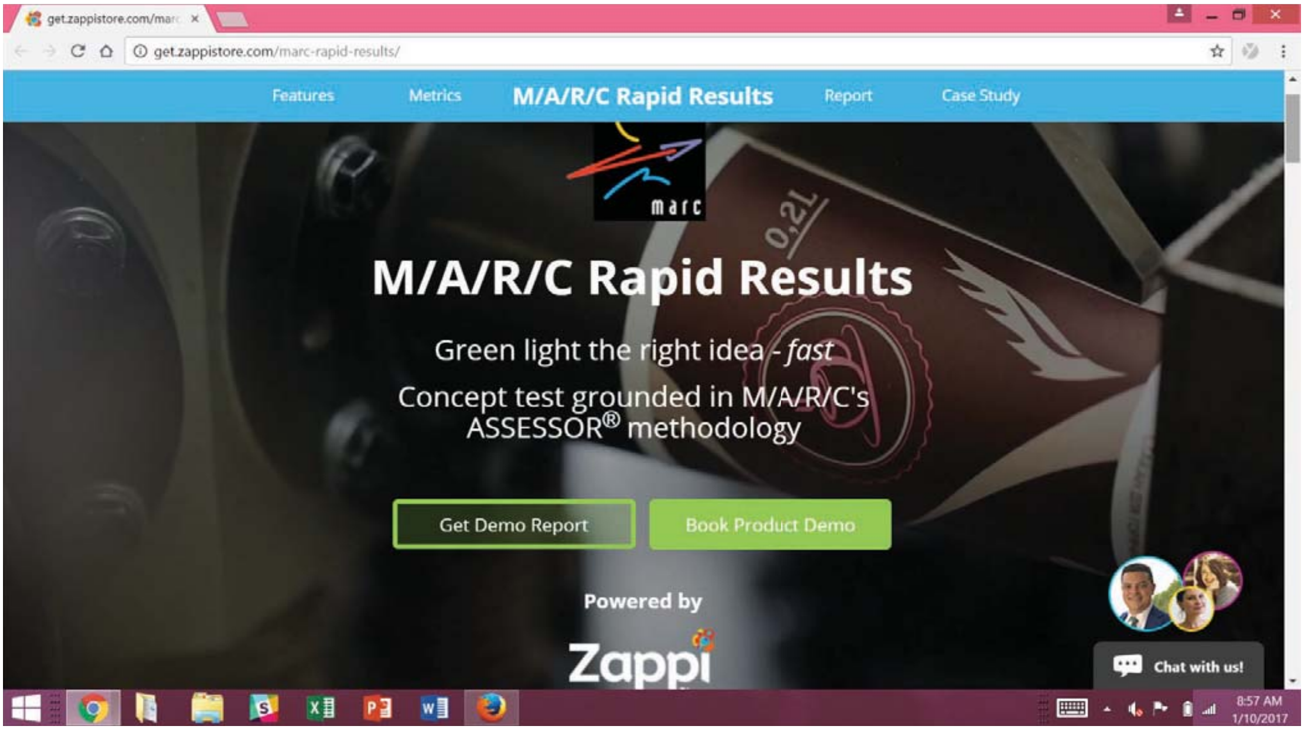

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www.zappistore.com exposed to so many surveys (both well-written and poorly-written), some begin to believe they understand exactly how they work. For those who have taken part in dozens, or even hundreds, of surveys over the years, it's tempting to believe they know enough to write one from scratch. But mere exposure to surveys is not comparable to formalized education and experience in questionnaire design.

It costs more, and takes more effort, to clean up or revise a poorly-written survey than to write a good one from scratch.

I studied research methodology for six years in college and take part in industry organizations, forums, continuing education and conferences throughout the year. My firm has several such full-service research consultants who work together to optimize the work we do for our clients. We design and execute more than 500 surveys a year and we've been doing so for almost 40 years. Even with all that experience, we still provide critical feedback and improvements to one another's surveys and passionately debate the best way to elicit the necessary data. Survey design is a major part of my specialized skill set and one in which I, and other researchers, take great pride.

For those who haven't formally studied survey methodology, writing your own survey is a bad idea. Here are the top six reasons why:

1. You're too close to the topic.

If you're considering writing your own survey, it's probably related to a topic that is important to you or to your ability to fulfill your professional obligations. But your investment in the topic and the importance of the outcome to you are potential stumbling blocks. It's all too easy to allow your own biases to creep into question-wording. When you pass a draft around your office, your internal team is not apt to recognize instances when your corporate culture and/or jargon are skewing the meaning of a question for respondents. You're also unlikely to recognize all the opportunities for eliciting negative ratings and comments or how to use them in a constructive and unbiased analysis of the final data.

2. You're overburdening your respondents.

It's very tempting to go overboard on survey length. The thinking is, "While we've got their attention, let's also ask X, Y and Z." This tendency to keep expanding the survey in the name of efficiency leads to respondent fatigue, poor data quality and survey abandonment. You need a survey that is custom-designed not only to address your questions and objectives but to be appealing and relevant to respondents. The rare customer or potential customer may share your fascination with the minutiae of the purchase decision process for your product or service but the vast majority do not. They may like your product and they may even love your brand but that doesn't translate into wanting to spend 20-30 minutes answering detailed and repetitive questions. Factors like value proposition, overall length, complexity and flow must all be considered, while still addressing the key research objectives. This is not a balancing act for the untrained to tackle.

3. You haven't thought through how the data will be analyzed.

It's not enough to brainstorm a list of questions for which the responses will be "interesting." Too often, that leaves novices with a file full of data they're not sure how to use to their best advantage. A good researcher knows how to think backward from the objectives. It's a specialized skill to be able to understand the analyses needed to accurately address the objectives, then envision the structure and type of data that will be required to perform those analyses. From there, an experienced researcher can design a questionnaire that will accurately and effectively populate the required data fields and successfully fuel insightful analysis.

4. You don't know why some formats are better for certain questions.

Related to #3 above, there are usually several possible ways to ask any given research question. Consider the following examples:

1. What sporting events do you plan to attend this month? (open-ended)
2. Are you going to attend a sporting event in this month? (yes/no/not sure)
3. How many sporting events will you attend in the next 30 days? (numeric response)
4. How many of each of the following types of sporting events will you attend in the next year? (grid with ranged responses)

It's important to consider how the data will be used before settling on question structure. I've had clients write up questions in all of these formats but most are unaware of the proper uses, benefits and disadvantages of any particular one.

Here's a pop quiz on just this one example among dozens of factors requiring evaluation for every single survey item. Match the question formats above with the advantages and/or disadvantages listed below:

a. Often used to screen respondents for qualification; not useful for deep segmentation *(Answer: Q. 2)*
b. Used to evaluate relative standing; space-efficient but adds to respondent fatigue and usually requires rotation or randomization *(Answer: Q. 4)*
c. Good for exploratory insights; creates respondent fatigue and often requires additional back-end coding *(Answer: Q. 1)*
d. Allows frequency-based analysis and segmentation; prone to overestimation *(Answer: Q.3)*

5. You don't suffer over every word.
Okay, maybe "suffer" is too strong a word but a talented survey writer can step back from a survey item and look at it from all angles. Does it really ask what you think it asks or is there room for multiple interpretations? Is there wording that creates subtle or implicit bias? Is the question, as crafted, likely to lead respondents to answer more positively or negatively? What are the impacts of previous questions in the same survey? Do the response codes and options align to the question and are they written in a way that allows every respondent to provide an accurate and complete answer? Each of those questions (and many others) is the subject of literally hundreds of research community articles, debates and experiments. It's simply not possible for someone with little to no knowledge of this background to adequately weigh these factors. Trust a trained research professional to help you create survey questions that will give you accurate, actionable and projectable data.

6. You don't have time and money to burn.
It costs more, and takes more effort, to clean up or revise a poorly-written survey than to write a good one from scratch. There is no value to surveys which, through inexperience, deliver incomplete, unactionable or inaccurate data. I can't tell you how many times I've had a client insist they will "save money" by writing their own survey, only for them to end up with unforeseen expenses and extended timelines when the results are suboptimal at best or unusable at worst. As professional researchers, we get it: We know your budget is limited and your timeline is tight. We want to help, really! When it comes to survey research, the GIGO principle (garbage in, garbage out) cannot be dismissed. Don't be afraid to invest a few hours of your research professional's time on up-front survey design – it will pay off in data accuracy, quality and utility.

Your dentist genuinely loves teeth and has spent years studying and practicing the best ways to take care of them. A trained research professional genuinely loves survey design and analysis and has invested significant time and effort in honing those skills. Let us keep you, and your business, all smiles.

Alice Blackwell is vice president of MDC Research, Portland, Ore. She can be reached at alice.blackwell@mdcresearch.com.

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26 TOP PANEL COMPANIES

Finding respondents for research can be difficult and time-consuming, especially if you need specific respondents. Panels provide a faster, easier way to find respondents for your research and these panel companies can help.

Research panels give you the convenience of having pre-screened respondents at your fingertips who are ready and willing to participate in surveys, studies or other types of research. Having these respondents on-hand lets you recruit large groups of participants quickly and easily in a wide variety of industries and specialties, either locally, nationally or globally. Whether a general audience is needed or a niche audience with specific ethnicities, occupations or age groups, this large reach allows you to choose from different types of respondents, from consumers to professionals and experts, to difficult-to-reach or difficult-to-find respondents. Panels let you target specific respondents, making the research more relevant and personalized. Here are some of the top companies offering online panels and other online research services.

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branded

Branded Research Inc.

Founded 2012 | 30 employees
Matt Gaffney, CEO

Branded is a leading data and technology company that gathers unique insights to help our clients make more informed marketing and product development decisions. Through proven and innovative methods, as well as proprietary technologies like Branded Surveys, Branded Research is able to actively engage with consumers and reach specified target audiences, resulting in more precise and complete end data. Our community is founded on core principles of social engagement

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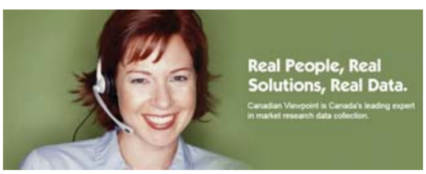
CANADIAN VIEWPOINT INC.

Canadian Viewpoint Inc.

Founded 1980 | 50 employees
Carol Udell, CEO



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Tom Buehlmann, CEO; Richard Thornton, Deputy CEO and COO

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Consumerfieldwork GmbH

Founded 2006 | 6 employees
Christian Brieskorn, CEO

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criticalmix

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Hugh Davis and Keith Price, Co-CEOs

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Full Circle Research Co.

Founded 2013 | 12 employees
Adam Weinstein, co-CEO; Nathan Lynch, co-CEO

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globalsurvey

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Mayank Bhanushali, Founder and Managing Director

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Gregg Lavin, Matt Dusig, George Llorens, Co-Founders

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Caroline Frankum, Global CEO

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Amber Leila Esco, CSO; Roni Das Gupta, CRO

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Dan S. Gaylin, CEO and President; J. Michael Dennis, AmeriSpeak Executive Director and NORC Senior Vice President

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Dr. Alexander Shashkin, CEO

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P2Sample

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Founded 1977
Gary Laben, CEO

Research Now SSI is the global leader in digital research data for better insights and business decisions. The company provides world-class research data solutions that enable better results for more than 3,500 market research, consulting, media, health care and corporate clients. Research Now SSI operates globally with locations in the Americas, Europe and Asia-Pacific and is recognized as the quality, scale and customer satisfaction leader in the market research industry.

www.researchnow.com and www.surveysampling.com.

SoapBoxSample

Founded 2013 | 46 employees
Jacqueline Rosales, Chief of Operations

You Don't Know What You Don't Know. Brands need insights that lead to great ideas. SoapBoxSample helps you turn your business questions into actionable insights. MySoapBox, our panel of highly-engaged respondents, was created to handle high-touch studies and mixed methodologies. Our passive metering panel, MySoapBox Meter, collects path-to-purchase data without disrupting the shopping process. Offering a FRESH blend of research and technology, our suite of services includes: Community Insight Platform (icmib); mobile and app-based research; passive metering; online data collection; and full-service design and analytics.

Phone 855-SOAPBOX
www.soapboxsample.com

SurveyMonkey Audience

Founded 1999 | 750 employees
Zander Lurie, CEO

SurveyMonkey Audience is the fastest DIY market research solution. Built right into the SurveyMonkey platform, we've integrated with panels in over 100 countries to enable global consumer research anytime, anywhere and for any budget. Target respondents by demographics or custom screening questions, automatically launch projects on your schedule, and start seeing results in real-time. SurveyMonkey Audience gets you instant feedback for a variety of market research use cases: ad testing, product development, brand tracking, consumer behavior, crisis management and more. Load Audience Credits for one-time financial approval and one-click checkout or expedite fielding by choosing High Priority Status. Run your own market research in minutes with SurveyMonkey Audience.

audience@surveymonkey.com
surveymonkey.com/audience

scientifically balanced samples worldwide

Symmetric, A Decision Analyst Company

Founded 2016 | 150+ employees
Jason Thomas, President of Symmetric

Our worldwide Internet panels set the standard for quality and consistency. Our suite of double opt-in panels include American Consumer Opinion® – worldwide panel of over 7 million consumers; Physicians Advisory Council® – our panel of over 20,000 verified physicians and surgeons; Medical Advisory Board™ – worldwide panel of over 40,000 nurses, optometrists, pharmacists and other health care professionals; Executive Advisory Board® – worldwide panel of over 100,000 managers and executives; Technology Advisory Board® – worldwide panel of over 105,000 information system professionals; and Contractor Advisory Board® – worldwide panel of over 30,000 general contractors from all segments of the construction industry.

Phone 817-640-6166
www.symmetricsampling.com

In touch with people

Toluna

Founded 2000 | 1,200+ employees
Frederic-Charles Petit, CEO

Toluna is a leading provider of on-demand consumer insights, empowering companies to brainstorm ideas, uncover new business opportunities and get answers to questions in real-time. With its innovative business concept Insights On Demand™, Toluna is transforming the future of market research, making consumer intent instantly accessible and understandable for companies of all sizes across multiple industries. Toluna's end-to-end automated research platform combines advanced technology and industry-proven methodologies with on-demand access to the world's largest community of 14+ million consumers in 68 countries. The company is headquartered in Wilton, Connecticut, and has over 25 offices in Europe, North America, South America, Asia-Pacific and the Middle East. For more information, visit www.toluna-group.com.

Phone 203-834-8585
corporate.toluna.com

Names of Note

■ **Stewart Tippler** has formed AST Media and will be working with *Quirk's Marketing Research Media* and other research industry companies and organizations to help expand the reach of their products and services and form partnerships across Europe.


Tippler

■ Marketing agency *Rauxa* has appointed **Preeti Patel** as vice president of technology, based in the firm's New York office.

■ In Los Angeles, consumer intelligence firm *Maru/Matchbox* has made two senior additions to its media and entertainment practice: **Andrew Hawn** as senior vice president, consulting; and **Audra Priluck** as vice president, business development.

■ White Plains, N.Y., retail merchandising and marketing services firm *SPAR Group Inc.* has promoted **Gerry Marrone** to chief revenue officer.

■ Herndon, Va., software and solutions firm *Deltek* has appointed **Perry Hardt** as senior vice president and chief marketing officer.

■ Researcher *Kantar* has appointed **Katie McClintock** as CEO of its insights division, comprised of Kantar TNS and Kantar Millward Brown, in Singapore.

www.quirks.comarticles/2018/20180313.aspx

■ Monroe, La., communications provider *CenturyLink* has named **Gaurav Chand** as executive vice president – marketing and **Shaun Andrews** as executive vice president, product management.

■ Port Washington, N.Y., information company *The NPD Group* has named **Nathan Shipley** as executive director/industry analyst for the firm's automotive aftermarket business.

■ Durham, N.C.-based research consultancy *W5* has announced that **Amy R. Castelda** is now a partner of the firm. She will lead all client relation activities, including account management, marketing and business development.


Castelda

■ *AOTMP*, an Indianapolis-based information, research and advisory firm for telecom management, has added **Andrew Hartwyk** as senior research director for its research and advisory practice.

■ *Edison Research* has announced it is expanding its Somerville, N.J., offices as it adds employees to support its growth in election and audio research. The company has also promoted the following: **Rob Farbman** to executive vice president; **Melissa Kiesche** and **Tom Webster** to senior vice president; **Nicole Beniamini**, **Randall Brown**, **Megan Lazovick**, **Mary Meyn** and **Johanna Roche** to vice president; and **Laura Silvia** to vice president, digital operations and information technology. **Clint Stevenson** has been hired as vice president, data science.

■ Los Angeles-based research firm *Hypothesis* has added **Savannah Daugherty** as a senior analyst.

■ In London, information, analytics and solutions firm *IHS Markit* has appointed **Lance Uggla**, the company's president and chief operating officer, as chairman and CEO following the retirement of Chairman and CEO **Jerre Stead**. The company has also added **John Browne** and **Nicoletta Giadrossi** as directors to its board.

■ Australia-based researcher *Pureprofile* has appointed **Nic Jones** as CEO. Jones replaces previous CEO **Paul Chan**, who will take on the role of chief innovations officer. Jones is also expected to be appointed to the board of directors as managing director.

■ In New York, researcher *Maru/Matchbox* has appointed **Tricia Juhn** to its financial services team. Juhn will also operate as a senior member of Maru/Matchbox's Qualitative Center of Excellence.

■ The board of the *Market Research Institute International*, Ann Arbor, Mich., has elected **Jeffrey Henning**, founder and president of *Researchscape International*, as board president for 2018. He succeeds Jon Last, founder and president at *Sports and Leisure Research Group*, who now becomes immediate past president. The board also elected the following: **Dan Coates**, president and co-founder of *Ypulse Inc.*, as president-elect; **Michael Mermelstein**, executive vice president of *Nichols Research*, as treasurer; **Guido Lara**, founder and president of *LEXIA Global*; **Karen Scherbaum**, group vice president, consumer insights, *Macy's Inc.*; and **David Scowcroft**, senior vice president, *Ipsos Healthcare*.

■ Minneapolis-based data collection and analysis agency *Custom Intercept*

Solutions has named **Jamie Noltner** as client services manager.

■ Jupiter, Fla.-based data collection company *Quick Test/Heakin* has recently promoted **Gilda Castro** to account manager.

■ San Mateo, Calif.-based retail analytics firm *Wiser* has appointed **Mathieu Gagné** as chief financial officer. He will be based in the firm's Boston office.

■ Chicago-based retail insights firm *SPINS* has appointed **Molly Hjelm** as vice president of marketing.

■ Bethesda, Md., researcher *Abt Associates* has named **Bernadette Sexton** as managing director of Abt Britain.

■ Waltham, Mass., research and consulting firm *Applied Marketing Science Inc.* has promoted **Carmel Dibner** to principal and **Patricia Yanes** to associate principal.

■ Little Rock, Ark., audience building platform *SpotRight Inc.* has added **Shannon Denton**, former global CEO of digital agency Razorfish and current principal and managing partner of Fifth Wave Ventures, to its board of advisors.

■ Loyalty and CRM company *Brierley+Partners*, Dallas, has appointed **Katsutoshi Murakami** as president and CEO. **Jim Sturm**, previous president and CEO, will assume the role of executive chairman.

■ Columbia, Md., marketing agency *Merkle* has appointed the following for Merkle Americas: **Matt Seeley** as executive vice president, technology services; **Joanne Zaiac** as chief client officer; and **Craig Dempster** as president.

■ *Kobie Marketing*, St. Petersburg, Fla., has appointed **Larry Roos** as chief information officer.

■ Portsmouth, N.H.-based online research panel *Opinions 4 Good* (Op4G) has added **Tariq Mirza** as an international strategic growth advisor based in the United Kingdom and Europe.

■ Arlington, Va., research company *Fors Marsh Group* has named **Ronne Ostby** as vice president of communication research.

■ *The Insights Association*, Washington, D.C., has appointed the following as board officers for 2018: **Rob Stone**, CEO, *Grail Research* as chair; **David Rothstein**, CEO, *RTi Research* as vice chair (will serve as chair in 2019); **Simon Chadwick**, managing partner, *Cambiar LLC* as immediate past chair; **Jeff Miller**, president and CEO, *Burke, Inc.*, will serve the second of his two-year term as treasurer; and **Lisa Courtade**, executive director, global customer and brand insights, *Merck*, begins a two-year term as secretary. The following will serve as directors in 2018: **Scott Baker**, vice president, U.S. qualitative, *Schlesinger Associates*; **Ivy Boehm**, VP market intelligence - small business, commerce solutions, *JPMorgan Chase & Co.*; **Lynnette Cooke**, global CEO, *Kantar Health*; **Ted Donnelly**, managing director, *Baltimore Research*; **Tim Hoskins**, president, *Quester*; **Ginny Kevorkian**, senior market research manager, *Emory Healthcare*; **Pierre LeManh**, CEO North America and global deputy CEO, *Ipsos*; **Neil Marcus**, assistant vice president, U.S. marketing science team, *MetLife*; and **Jude Olinger**, CEO, *The Olinger Group*. **Dan Womack**, head of insights for *Aflac* and an MRA and Insights Association board member since 2011, has retired from the board.

■ *Kantar Public*, the London-based public policy and communications division of Kantar, has appointed **Sean Larkins** as global CEO of Kantar Public Consulting.

■ Sterling, Va., information services company *Neustar Inc.* has appointed **Kenneth Ewell** as vice president of customer success for its analytics solutions.

■ Digital experience analytics firm *Decibel Insight* has appointed **Even Walser** as chief revenue officer. The company has also appointed **Brian Bullock** as VP of U.S. sales; **Adnan Erriade** as VP EMEA sales; **David Ives** as VP of engineering; and **Lindsay O'Gorman** as VP of marketing.

■ In Philadelphia, research company *Psyma International* has appointed **Gordon Gochenauer** to lead its oncology practice.

Research Industry News

News notes

■ **Research Now SSI** announced that 37 of its employees died in December as a result of a fire at the NCCC mall in Davao, Philippines, the location of one of its call center operations. The company hosted a memorial service in Davao and has raised over $90,000 for the families of the victims.

■ 2018 marks the 20th anniversary for U.K. research company **Join the Dots**.

■ **Colorado State University-Global Campus**, Greenwood Village, Colo., is launching a Master's of Science in Data Analytics degree program in 2018.

Acquisitions/transactions

■ Chicago-based media software and services firm **Cision** has agreed to acquire New York-based media measurement and analysis company **PRIME Research**. Cision will expand its offerings that help communications professionals identify influencers, craft campaigns and attribute business value to those efforts.

■ China-based big data and AI solutions firm **Baifendian Group** has acquired online survey company **InsightWorks**. Following the acquisition, InsightWorks will continue to provide services for enterprises and consumers with independent brand operation and Baifendian will integrate big data and AI into InsightWorks.

www.quirks.com/articles/2018/20180314.aspx

■ **American Family Insurance**, Madison, Wis., has acquired Chicago-based data and analytics software company **Networked Insights**. Networked Insights will operate as a stand-alone subsidiary of the American Family Insurance enterprise and will collaborate with American Family data scientists on projects using advanced analytic capabilities to improve customer interactions and business value.

■ London-based B2B information company **Ascential** has acquired Dublin-based e-commerce insight firm **Clavis Insight**. Clavis Insight will form a part of Ascential's information services division alongside One Click Retail, a U.S.-based e-commerce data measurement company that was acquired by Ascential in 2016.

■ U.K.-based marketing solutions firm **BlueVenn** has acquired **LEAP Media Solutions**, a customer analytics and marketing campaign services firm based in Raleigh, N.C. The acquisition will allow LEAP customers to better integrate with BlueVenn software tools and will allow BlueVenn to continue to expand into the U.S. market.

■ Rhinebeck, N.Y., marketing services firm **Phoenix Marketing International** has acquired assets of TV Brand Effect from **Nielsen**. TV Brand Effect provides resonance tracking capabilities to measure memorability and quality of advertising campaigns in order to improve ROI. The acquisition will expand Phoenix's presence in the media and consumer packaged good sectors. Nielsen will retain its other Brand Effect assets.

■ Ithaca, N.Y., researcher **Claritas** has acquired Miami-based multicultural business intelligence firm **Geoscape International Inc.**

■ **Kantar Consulting**, Kantar's newly-launched growth consultancy, has acquired London-based brand strategy and growth consultancy **Mash**. Mash will join Kantar Consulting's newly-formed brand and marketing practice.

■ San Jose, Calif., user experience research firm **UserZoom** has acquired research technology company **WhatUsersDo**.

■ **AOTMP**, an Indianapolis-based information, research and advisory firm for telecom management, has acquired Boston-based firm **Blue Hill Research**. The research, analyst, client services and sales teams will join AOTMP and Ralph A. Rodriguez, founder and research fellow, will take on the role of strategic advisor at AOTMP. The combined company looks to integrate Blue Hill Research into the AOTMP research practice.

■ In Shanghai, **ITWP Acquisitions Limited**, the parent company of consumer insights firm Toluna, has acquired online and mobile panel company **Shanghai KuRun Information Technology Co.** KuRunData's company Founders Pan Hao and Wang Changwei will remain chairman and CEO of KuRunData. The acquisition will expand Toluna's operations into mainland China.

Alliances/strategic partnerships

■ In New York, researcher **Kantar** has formed a joint venture with **Second City Works**, the B2B arm of comedy theater company The Second City. Second City Works uses improvisational methods and audience-centered collaboration with consumer audiences. The collaboration, marketed as Brandstage, will work with marketing companies to drive new product innovation, originate marketing and communications ideas and explore customer experience opportunities.

Association/organization news

■ The board of the **Market Research Institute International**, Ann Arbor, Mich., has elected Jeffrey Henning, founder and president of Researchscape International, as board president for 2018. He succeeds Jon Last, founder and president at Sports and Leisure Research Group, who now becomes immediate past president. The board also elected the following: Dan Coates, president and co-founder of Ypulse Inc., as president-elect; Michael Mermelstein, executive vice president of Nichols Research, as treasurer; Guido Lara, founder and president of LEXIA Global; Karen Scherbaum, group vice president, consumer insights, Macy's Inc.; and David Scowcroft, senior vice president, Ipsos Healthcare.

■ **The Insights Association**, Washington, D.C., has appointed the following as board officers for 2018: Rob Stone, CEO, Grail Research as chair; David Rothstein, CEO, RTi Research as vice chair (will serve as chair in 2019); Simon Chadwick, managing partner, Cambiar LLC as immediate past chair; Jeff Miller, president and CEO, Burke, Inc., will serve the second of his two-year term as treasurer; and Lisa Courtade, executive director, global customer and brand insights, Merck, begins a two-year term as secretary. The following will serve as directors in 2018: Scott Baker, vice president, U.S. qualitative, Schlesinger Associates; Ivy Boehm, VP market intelligence - small business, commerce solutions, JPMorgan Chase & Co.; Lynnette Cooke, global CEO, Kantar Health; Ted Donnelly, managing director, Baltimore Research; Tim Hoskins, president, Quester; Ginny Kevorkian, senior market research manager, Emory Healthcare; Pierre LeManh, CEO North America and global deputy CEO, Ipsos; Neil Marcus, assistant vice president, U.S. marketing science team, MetLife; and Jude Olinger, CEO, The Olinger Group. Dan Womack, head of insights for Aflac and an MRA and Insights Association board member since 2011, has retired from the board.

Awards/rankings

■ New Orleans-based audience platform **Lucid** has announced its latest sample supplier quality scores and GDPR compliance statuses. The Lucid Supplier Quality Program measures sample quality from participating respondent suppliers. The full list is updated quarterly. The top 10 quality suppliers ranked by Q Score include: 1. Prodege; 2. PeanutLabs; 3. Active Measure; 4. P2Sample; 4. Dayos (P2Sample and Dayos have the same score); 6. Research for Good; 7. Tap Research; 8. Qmee; 9. Market Cube; and 10. TheoremReach.

■ **Esther Tot** of Cambodia is the latest recipient of a scholarship funded through a partnership between the **ESOMAR Foundation**, nonprofit **Women in Research** and **Unilever**. Tot will be pursuing an English-based bachelor's degree program in international business at the National University of Management, Cambodia.

■ Analytics and insights firm **Blueocean Market Intelligence** has been ranked as one of the 10 leading providers of analytics and data sciences in India in 2017 by Analytics India Magazine. The magazine surveys and nominates analytics providers in India that have shown visible growth and achievements in the last year.

New accounts/projects

■ In New York, **Cumulus Media** has signed a multi-year extension with **Nielsen** for radio ratings services for all Portable People Meter and radio diary-measured markets. Westwood One, the national-facing arm of Cumulus Media, is also included in the agreement. The agreement provides Nielsen's radio and network radio ratings services for Cumulus and Westwood One's 446 radio stations across 90 local markets.

■ India-based research firm **MRSS India**'s social research practice has been awarded a research project, The Longitudinal Aging Study in India, which will cover a sample size of over 60,000 people aged 45 and older.

New companies/new divisions/relocations/expansions

■ London-based researcher **Kantar** has merged four of its brands – Kantar Added Value, Kantar Futures, Kantar Vermeer and Kantar Retail – to form Kantar Consulting, a sales and marketing consultancy for brand owners and retailers. Phil Smiley will be CEO of Kantar Consulting.

■ Netherlands-based research firm **MetrixLab** has opened a new office in Buenos Aires, Argentina, and has appointed Diego del Pozo Mitschele as managing director for the country. The company has also appointed Eric Lammerts van Bueren as managing director for the Netherlands, replacing Jolique Weelink, who is moving to a client-facing position in the company.

■ Data and analytics company **Ugam** has opened an office in Santa Clara, Calif. The office will support new and expanding relationships with clients in the region's business sector, including retailers, brands, B2B manufacturers and distributors and market research firms.

■ London-based health care research firm **Research Partnership** has opened a new office in Lyon, France, led by Claire Fradet-Aubignat as associate director.

Research company earnings/financial news

■ Israel-based analytics company **Anodot** has announced a Series B round, bringing its B funding total to $23 million. The company will use the investment to open offices in London and APAC, grow its U.S. team and invest in sales, marketing and customer success.

■ Audience data firm **Eyeota**, based in Singapore, has secured $12.5 million in Series B funding. The funding round was led by private equity firm Jolt Capital SAS. The company will use the funding to support product development and expand its team.

CALENDAR OF EVENTS

can't-miss activities

ESOMAR will hold its Generating Insights Bootcamp on **March 19-20** in **Dubai, UAE**. Visit www.esomar.org.

Merlien Institute will hold its Qual360 North America event on **March 21-22** in **Washington, D.C.** Visit na.qual360.com.

ARF will hold its CONSUMERxSCIENCE 2018 event on **March 27-28** in **New York**. Visit bit.ly/2g99He3.

Worldwide Business Research will hold its NGCX 2018 event on **March 27-29** in **Phoenix**. Visit bit.ly/2sbhLDh.

KNect365 (IIR) will hold its FUSE 2018 event on **April 9-11** at the Dream Hotel Downtown in **New York**. Visit bit.ly/2vpiqRB.

UTA MSMR Alumni Association will hold their annual insights conference for the industry on **April 12** in **Arlington, Texas**. Visit msmralumni.org.

ESOMAR will hold its Latin America 2018 event on **April 15-17** in **Buenos Aires, Argentina**. Visit www.esomar.org.

Marcus Evans will hold its Consumer Insights to Innovation Action event on **April 18-19** in **Boston**. Visit bit.ly/2BIWaqk.

AMA Northeast Ohio will hold its 2018 Market Research Conference on **April 19** in **Independence, Ohio**. Visit bit.ly/2ET8s0w.

KNect365 (IIR) will hold its CX Next event on **April 23-25** at the Seaport World Trade Center in **Boston**. Visit bit.ly/2v4pAYC.

Merlien Institute will hold its MRMW North America event on **April 24-25** in **Cincinnati**. Visit na.mrmw.net.

PAA will hold its 2018 Annual Meeting on **April 26-28** at the Sheraton Denver Downtown in **Denver**. Visit bit.ly/2xgZ131.

Insights Association will hold its NEXT 2018 conference on **April 30 - May 1** in **New York**. Visit bit.ly/2kK4lLk.

Worldwide Business Research will hold the B2B Online 2018 event on **May 7-9** in **Chicago**. Visit bit.ly/2DdSg64.

KNect365 (IIR) will hold its TMRE in Focus event on **May 7-9** at the Kimpton Gray Hotel in **Chicago**. Visit bit.ly/2ggsCpT.

ESOMAR will hold its Asia Pacific 2018 event on **May 13-15** in **Bangkok**. Visit www.esomar.org.

ASA will hold its Symposium on Data Science and Statistics on **May 16-19** at the Hyatt Regency Reston in **Reston, Va**. Visit bit.ly/2g8o1TW.

ESOMAR will hold its Semiotics Bootcamp on **May 16-17** in **Bangkok**. Visit www.esomar.org.

AQR and **QRCA** will hold the 2018 Worldwide Conference on Qualitative Research on **May 16-18** in **Valencia, Spain**. Visit www.qrca.org.

New England Insights Association will hold its 2018 Spring Conference on **May 22** in **Waltham, Mass.** Visit www.newenglandia.org/conf.

LIMRA will hold The Marketing Conference on **May 30 - June 1** at the Hyatt Regency Baltimore in **Baltimore**. Visit www.limra.com.

ESOMAR will hold its Summer Academy 2018 event on **June 4-7** in **Amsterdam**. Visit www.esomar.org.

NMSBA will hold its Shopper Brain Conference - USA event on **June 7-8** in **New York**. Visit bit.ly/2gGCVAZ.

KNect365 (IIR) will hold its Mavericks of Media event on **June 8** at J. Walter Thompson in **New York**. Visit bit.ly/2FQQf0u

MRIA will hold its 2018 Annual Conference on **June 10-12** in **Vancouver, British Columbia**. Visit bit.ly/2ygCoAp.

KNect365 (IIR) will hold its OmniShopper event on **June 13-15** at the Westin Chicago River North in **Chicago**. Visit bit.ly/2eI8KbF.

UXPA will hold its 2018 International Conference on **June 26-28** in **Rio Mar, Puerto Rico**. Visit uxpa2018.org.

Travel and Tourism Research Association will hold its 2018 International Conference on **June 26-28** in **Miami**. Visit bit.ly/2gBfk5l.

EphMRA will hold its 2018 Conference on **June 26-28** at the Congress Centre in **Basel, Switzerland**. Visit www.ephmra.org.

NMSBA will hold its Shopper Brain Conference - South America event on **August 30-31** in **Rio de Janeiro**. Visit bit.ly/2j3FGR1.

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...

Chris Jesurun
Manager, Consumer and Brand Insights, Potbelly Sandwich Shop

"When you start with what you've learned and connect it to why it's important, then the key takeaways become the climax of the story."

You started your career with Potbelly as a sandwich maker. In what ways has this starting point impacted your current role as manager of consumer and brand insights?

Having worked as a sandwich maker has provided invaluable insight into our customers. I've met so many types of customers and I've seen their unique behaviors and need-states firsthand. It's an exceptional source of context that I apply when writing survey questions, understanding qualitative feedback and interpreting consumer data.

What tips do you have for client-side marketing researchers looking to incorporate informal focus groups in the product development process?

Recruiting is often the biggest challenge so we recruit a panel of participants that agree to attend four groups over the course of a year. We always host at Potbelly shops so all of the test products are prepared fresh, just as they would be for customers. Hosting at our shops also allows us to quickly remake products as we get feedback so we can rapidly move through multiple product iterations.

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

We've recently modeled the relationship between the feedback we receive during product testing and the actual in-market performance of those products. It's changed our understanding of which consumer ratings are the most important because now we know which are the best predictors of future performance. Prior to this analysis, we could only evaluate potential test products by comparing their ratings to a benchmark average. Now we can use the forecasted results to make those decisions.

What steps do you take to ensure you are effectively communicating research findings to corporate decision makers so the research inspires action?

Storytelling is key. I used to start all of my decks with an executive summary, which is like starting a story at the end. If you've ever had a movie ending spoiled for you, you know that you lose the emotional impact of watching the story unfold. And when you start with the key takeaways, the rest of the deck ends up reading like a defense of your conclusions. But when you start with what you've learned and connect it to why it's important, then the key takeaways become the climax of the story. I now create decks that build what we've learned from one slide to the next. When done right, decision makers get invested in the outcome and the decks become page-turners.

Read the full interview at www.quirks.com/articles/2018/20180322.aspx.