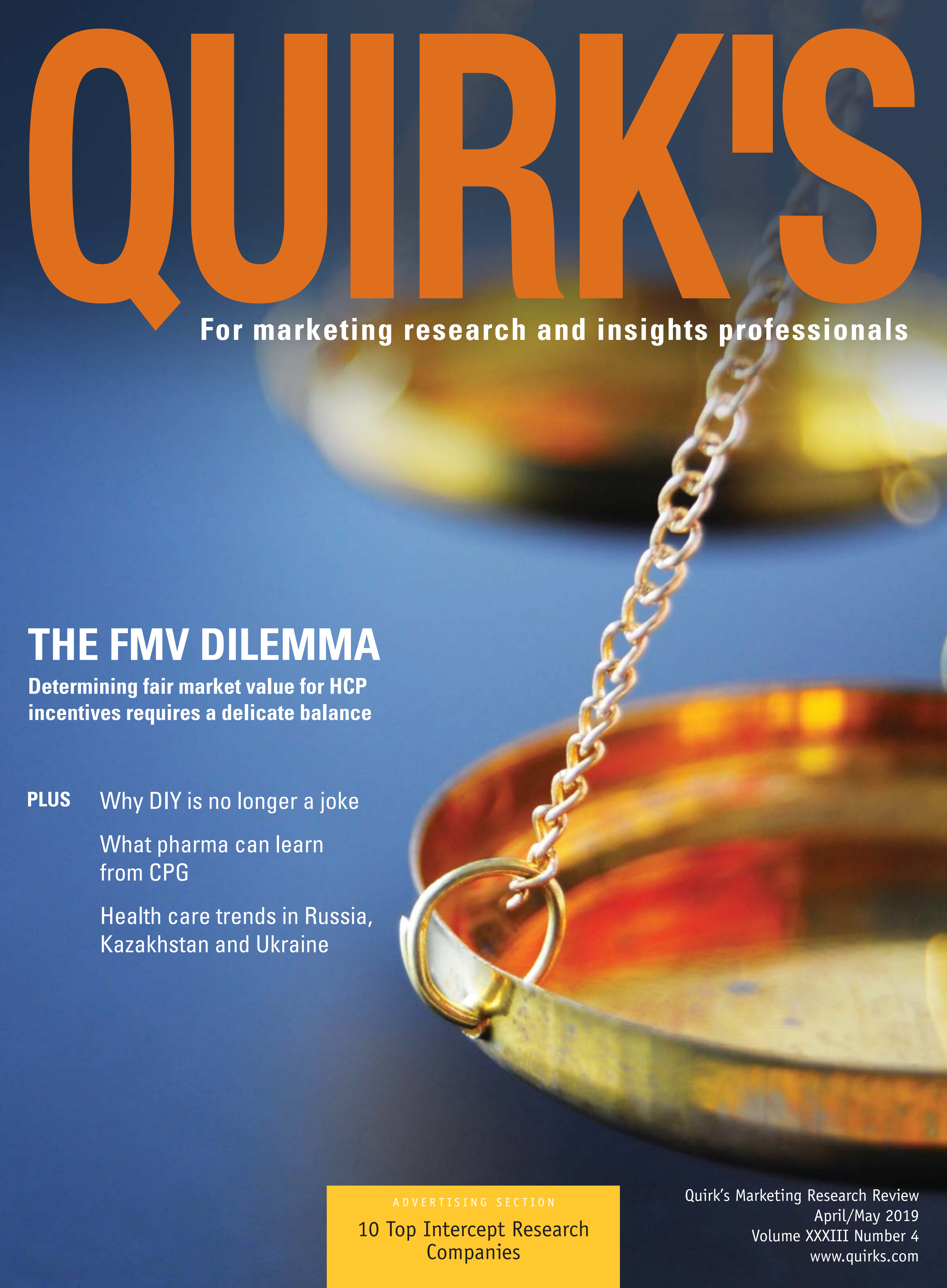

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Quirk's Marketing Research Review
April/May 2019
Volume XXXIII Number 4
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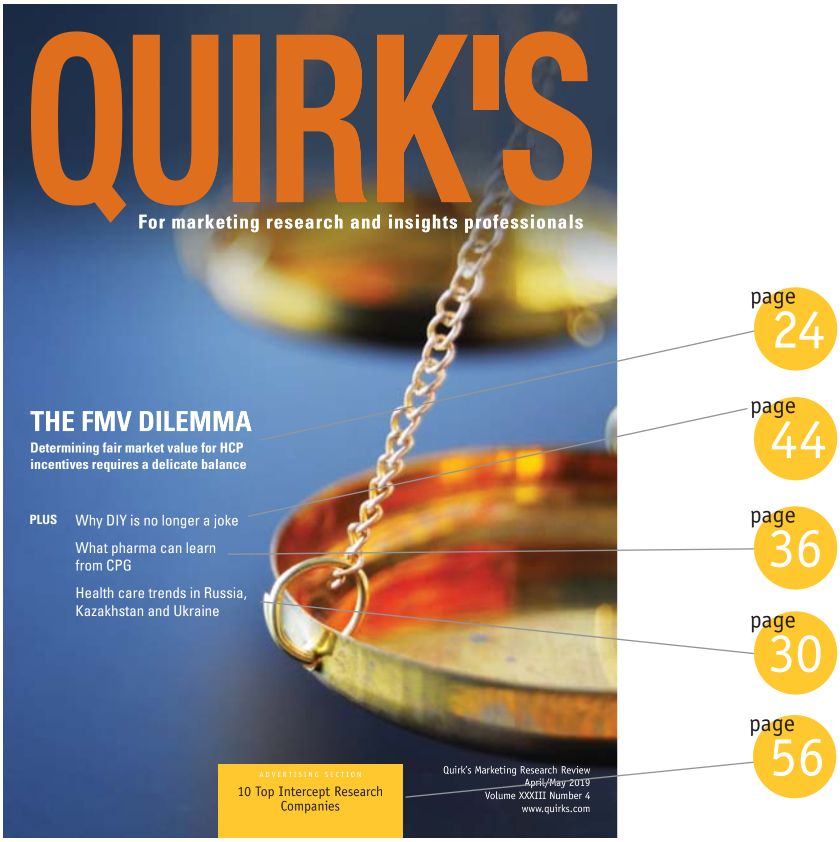

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ON THE COVER

TECHNIQUES

COLUMNS

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

Publisher • Steve Quirk
steve@quirks.com | x202

Editor • Joseph Rydholm
joe@quirks.com | x204

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

News Editor • Sara Cady
sara@quirks.com | x212

Audience Development • Ralene Miller
ralene@quirks.com | x201

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

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

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

Sales • Lance Streff
lance@quirks.com | x211

European Sales • Stewart Tippler
stewart@quirks.com | +44(0)7989-422937

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SEMINAR DATES, LOCATIONS & FEES

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Cincinnati	Apr 30-May 3	Cincinnati	Dec 10-13
Cincinnati	July 30-Aug 2		

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Cincinnati	June 25-28		

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The benefits of one-on-one meetings
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5 red flags to avoid in your next interview
https://bit.ly/2F4lcPZ

••• social media

Buzz from The #QuirksEvent 2019

Attendees at the 2019 Quirk's Events were all a-Twitter. We love to read your thoughts throughout the event and we were humbled by the overwhelmingly positive tweets and LinkedIn posts! Here are just a few tidbits attendees shared during the events:

@Julie1Research
Concept testing visual discovery – DellEMC and Dynata learned that image with code on the screen has to have code that is not obsolete. Respondents also love relatable imagery like a coffee cup in hand #QuirksEvent

@catherinehaigh
Incredibly inspiring presentation from BV Pradeep @ Unilever and @ESOMAR #QuirksLondon 'we need to give evidence of the seeds in the ground today that are the future of tomorrow'

Jessica Jaffe
Had the chance to listen to some great and thought-provoking talks at the Quirk's Event this week -- and also reconnect with some wonderful people. Thanks for the inspiring ideas, smiles, and reminiscing! Will be taking these back with me to TLV and Booking.com.

If you haven't already, follow us on Twitter @QuirksMR.

// E-newsworthy

Reenergize your insights with 5 resolutions for 2019
quirks.com/articles/2019/20190325-1.aspx

Prioritizing the respondent experience
quirks.com/articles/2019/20190325-2.aspx

The value of small data in today's experience economy
quirks.com/articles/2019/20190226-1.aspx

••• employee research

Can surveys help retain unhappy workers?

Giving low-wage workers a "voice" on the job – the ability to communicate concerns to management – is believed to improve employee satisfaction and retention, according to a study by Michigan Ross Professor Ach Adhvaryu and two colleagues, Teresa Molina of the University of Hawaii and Anant Nyshadham of Boston College.

Using a field-based, randomized, controlled trial, the study was conducted in partnership with a ready-made garment company in India, Shahi Exports, which experiences high turnover among its 100,000 workers. The employees recently had learned that their annual raises would be considerably lower than expected. The researchers randomly selected a group of these workers to take an anonymous survey on wages, job conditions and environment and supervisor performance.

The researchers found that giving these workers a voice through the survey reduced both turnover and absenteeism, compared to those who did not receive the survey. The effect was greatest for the most-disappointed workers. Overall, giving workers the survey reduced their probability of quitting by about 20 percent. "Setting up that line of communication might actually generate less attrition and that's potentially of value to both workers and firms," Adhvaryu says.

Adhvaryu and his team are working to extend this research. One angle they're pursuing is the value of using technology like text messaging and mobile apps – including one they're developing themselves – to help enable worker voice. They're also studying the power of incentives to encourage managers to respond to workers' concerns.

www.quirks.com/articles/2019/20190401.aspx

••• economic research

Race, ethnicity color economic views

A report by Burbank, Calif., cultural insights agency ThinkNow shows differing views on the economy based on ethnicity and race. The survey, fielded in December 2018, found that more than one-third of Americans (35 percent) say their household financial situation improved in 2018, compared to nearly 20 percent who say it worsened.

According to the report, over half (57 percent) of non-Hispanic whites were most likely to say their household income improved from one year ago, while the share of Hispanics who stated their financial situation improved in 2018 dropped from 35 percent in 2017 to 27 percent.

Asian-Americans felt their financial situation remained stable the past year, with a slight increase saying their financial situation worsened, from 19 percent in 2018 compared to 15 percent in 2017.

Almost one-quarter (23 percent) of non-Hispanic whites believe the economy is growing rapidly, while 29 percent of Asian-Americans and equally as many African-Americans think the economy will worsen in 2019. Twenty-nine percent of the total market feel the economy will worsen in 2019 – a rise of five percentage points since 2015.

By Joseph Rydholm, Quirk's Editor

The trend is no trend

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Joe Rydholm can be reached at joe@quirks.com

We're two Quirk's Events into our three-event 2019 schedule, having just completed the Brooklyn event and about a week away from the Chicago event at the time of this writing, and it's got me thinking about trends.

I've never been much for trends, at least when they pertain to marketing research, which is not ideal for someone who does what I do for a living. Editors, especially at B2B outlets, are generally all about trends – writing about them, dissecting them, assessing their potential longevity. We get asked all the time: "What trends are you seeing?"

My trend-wariness stems from the fact that while many trends are certainly real – born of market or social forces or the advent of new technologies – I feel like some are manufactured or are at least open to a chicken-or-egg kind of debate. Is it a trend because you and a few other people labeled it as such and started talking about it? Or were enough people talking about it that it became a trend as the din grew louder?

It's just seemed to me over the years that quite often in our industry (and no doubt in many others) trends have agendas behind them. Especially since the rise of social media, you get a few loud-talkin' CEOs or other organizational mouthpieces tweeting or posting "articles" on LinkedIn or speaking at conferences about a technique or method or movement that happens to be part of their companies' offerings and it can start to feel like a trend, even though it's manufactured instead of organic.

All of this musing comes about as I reflect on the array of sessions at this year's Quirk's Events. From the beginning, we've generally eschewed session tracks (not that we won't ever try doing some!), mostly because we try to avoid shoehorning presenters into one theme just to fit our programming needs. And, too, I'm more comfortable with spreading topics out across the day rather than forcing someone to stay in the same room for a whole morning or afternoon because that's where all the sessions for one track are.

Plus, despite all of one's best efforts in vetting a presenter, there are no guarantees they will stay on-topic and deliver on the promises made by their session title and description. So that talk on behavioral economics and CX might end up spending precious little time on either topic.

What do tracks have to do with trends? Well, session tracks can be mileposts on the road to a trend. You go to enough conferences and see enough similarly themed tracks and – voila! – you start seeing trends. And while thinking about things in terms of frameworks like trends can be great for making change seem more manageable and understandable, I guess I'd rather take a different tack and that's been reflected in the way our Quirk's Event sessions are assembled.

There's so much change afoot in how you researchers do your jobs and while I certainly don't think using trends as a lens through which to view that change is potentially harmful, it just feels more beneficial to steer clear of categories or strict rubrics. Listening to the many passionate, enthusiastic speakers at our London and Brooklyn gatherings, one of the main qualities researchers seem to need today is flexibility. Rather than getting distracted by where trends are pointing and what processes are involved, it feels more worthwhile to focus on outcomes and deliverables.

As new tools and new ways of using them keep cropping up, you're almost being forced to learn and react on the fly. Getting bogged down in labels (Qual or quant? UX or MR?) feels like self-limiting behavior, especially when your end-clients likely don't think in those terms – they just want their questions answered. The more you can be open to new ways of thinking, new ways of approaching and solving problems, the better prepared you'll be to handle whatever comes at you.

www.quirks.com/articles/2019/20190402.aspx

••• advice for researchers

ASK THE EXPERT

Expert answers to important research questions.

Can your brand catch a cultural wave?

It's tempting to try to heighten a brand's relevance by trying to surf a cultural wave. If your brand catches the wave just right, it can be catapulted into the collective awareness and gain deep relevance. But deciding if and how to surf that wave is tricky. If you don't catch it right, the wave can crash on you.

A couple recent examples illustrate what happens when brands wipe out on a cultural wave:

- Gillette alienated many consumers with its *The Best Men Can Be* short film, which addressed social topics including the #MeToo movement, bullying and toxic masculinity. Although it drove social media hits, negatives outweighed positives by almost 2-to-1.
- Pepsi's *Live for Now* short film featuring Kendall Jenner also faced backlash, in this case for trivializing protests and the Black Lives Matter movement. This led to words every marketer fears: "There are some concerns on impact to the brand and volumes," (Robert Ottenstein, Evercore ISI, quoted in *Ad Age* 4/6/17).

As culture evolves, companies need to be thoughtful about how their brands evolve with it. To succeed, you must know how your core consumers' values line up with the stance you're thinking of taking.

How do you do that? Here are a couple of things to consider:

- Successful brands have deep roots connecting them to their consumers' personal values – the emotional criteria we use to determine if the brand is a good fit for us.
- Satisfying those values is the end goal and good strategy involves mapping the decision pathways that take consumers from consideration through to the satisfaction of values. There are validated, structured ways to uncover those pathways to create such a map.
- Once you are able to determine the dominant decision pathway leading to the purchase of your brand, you can test how well a social or cultural issue fits on that decision pathway and meets the values of your most important audience(s).

When a brand takes a stance that aligns well with its consumers' values, it produces results. For instance, Dove's long-running "Real Beauty" campaign increased its sales from $2.5 billion to $4 billion in its first 10 years.

Do you know your consumers' decision pathways? Do you clearly know and understand the linkages between your product/service and the values your consumers seek? Do you measure your programs based on how well they mirror those pathways?

Darren Bishop
Senior Solutions Consultant,
Brand, System + Journey
Heart+Mind Strategies
dbishop@heartandmindstrategies.com
571-926-8852 x313

HEART+MIND STRATEGIES

If you are not confident you know these things, I strongly encourage you to take steps to find out. These are foundational to any brand that is built to last and have broad implications for all aspects of your marketing, including brand strategy development, segmentation, advertising development and your choice of what social and cultural waves (if any) to surf.

Have a question you'd like to have answered? Submit it to info@quirks.com.
Want your firm to be featured as an expert? Contact sales@quirks.com for more information.www.quirks.com/articles/2019/20190455.aspx

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IN FOCUS

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

// Survey Monitor

••• hispanic research

Hispanic entrepreneurs confident for 2019

Struggle to find, retain talent

Hispanic small business owners are confident about their 2019 business outlook, with strong majorities planning for increased revenue, growth and expansion, according to Bank of America's third-annual Hispanic Small Business Owner Spotlight. Per BizReport's Kristina Knight, those plans include expansion (87 percent), increased revenue (74 percent) and hiring plans (51 percent). Roughly one-third (34 percent) say their business has already grown above their original expectations. Just over half (55 percent) of non-Hispanic business owners have growth plans and only about one-fourth (25 percent) say their business has grown above original expectations.

This edition of the Spotlight finds that Hispanic entrepreneurs are significantly more optimistic than their non-Hispanic counterparts when it comes to both their business and economic outlooks. Similarly, Hispanic business owners report greater confidence in the direction of the national economy as well as their local economies.

These high optimism levels persist despite lingering economic concerns and new operational challenges. Contrasting with their overarching confidence, Hispanic entrepreneurs are more concerned about many economic issues compared to their non-Hispanic peers.

Additionally, the ultra-competitive job market has created a challenging environment for Hispanic entrepreneurs looking to find the right workers. Hispanic business owners are much more likely to have had employees leave over the last year compared to their non-Hispanic peers. As a result, they are also more likely to adjust their hiring strategies to increase their chances of retaining and landing top talent.

"Consistent with years prior, Hispanic small business owners are embracing a significantly more confident outlook toward growth compared to their non-Hispanic counterparts," says Elizabeth Romero, Small Business Central Division executive, Bank of America. "This optimism, however, does not come without challenges. As Hispanic entrepreneurs look to augment growth plans by hiring, today's job market has created an especially difficult environment to attract and retain talent."

Despite these obstacles, many Hispanic entrepreneurs report that their business has grown beyond their original expectations and identify family, community and employees as their primary sources of motivation and success. With an eye toward future generations, many hope to pass their business on to their children.

GfK Social and Strategic Research conducted the Bank of America Hispanic Business Owner Spotlight survey between August 30 and October 16, 2018 using a pre-recruited online sample of Hispanic and non-Hispanic small business owners. GfK contacted a national sample of 1,067 small business owners in the U.S. with annual revenue between $100,000 and $4,999,999 and employing between two and 99 employees, as well as 303 interviews among Hispanic small business owners. The final results were weighted to national benchmark standards for size, revenue and region and, for the Hispanic augment, whether the respondents were primarily English-speaking or Spanish-speaking.

www.quirks.com/articles/2019/20190403.aspx

••• retailing research

It's nothing personal

Marketers' personalization efforts missing the mark

Modern marketing strategies are all about personalization and accurate customer targeting. While this concept is nothing new in the online retail realm, research has revealed a troubling gap between how retailers think they're performing and how they're actually influencing consumer purchasing habits.

Forrester Consulting, in collaboration with Listrak, has found that 94 percent of retailers feel like they're hitting the mark in terms of customer-obsessed marketing when in reality, only 9 percent are, Power Retail reports.

According to Forrester, the main concern around this data is that retailers are viewing personalization as traditional segmentation, which looks largely at single data points like age, gender and purchase history. The flaw with this, however, is that it directs content to consumers based on past needs and isn't necessarily reflective of current intent.

Surveying consumers in the U.S. who shop online at least once a month, Forrester found that 72 percent of shoppers are more likely to make a purchase with retailers that send relevant communications. A further 70 percent reportedly said that they're more likely to remain loyal to a brand if they feel like the business understands their needs.

In addition to this, 69 percent of shoppers reportedly agreed they would be willing to share details about their interests and preferences if it meant they would only receive relevant communications, while 67 percent report feeling frustrated when they receive "generic" sales offers/promotions.

"The new imperative for customer obsession is driven by customer expectations for high-quality, relevant communications that add value to their daily lives," Forrester said in the

••• health care research

Retirees sweat health care costs

Early retirement = longer life?

When asked to name barriers to financial independence and early retirement, Americans are less concerned about uncertain market conditions (37 percent) or inflation (35 percent) than they are about health care costs (57 percent), according to a survey of 1,500 Americans aged 45 and older with $250,000 or more in investable assets conducted for TD Ameritrade.

"While Americans are enjoying longer lifespans, which may mean covering health care expenses and long-term care costs for extended periods of time, they also face the increasing costs of health care," says Matt Sadowsky, director of retirement and annuities, TD Ameritrade. "The good news is that Americans do recognize that health costs should be a top priority when planning for retirement [44 percent], with 57 percent showing interest in holistic wellness planning, including financial and physical health."

Seven in 10 (72 percent) of those who identify as financially independent say health is a motivator to retiring early. Three-quarters (76 percent) of the financially independent believe retiring early will help them live longer. In fact, only 15 percent of financially independent retirees report being stressed compared to 47 percent of their non-retired counterparts.

An overwhelming majority of Americans (76 percent) point to Medicare as the best way to pay for health care in retirement yet more than half of pre-retirees (61 percent) are not confident that it will cover the bulk of their retirement medical expenses. Other tools that Americans plan on using to tackle health care expenses include: supplemental health insurance (51 percent), health insurance (42 percent) and Social Security (41 percent). Forty-six percent of those surveyed are likely to max out their health savings account (HSA) contributions. Only 19 percent cite long-term care costs for a family member and unexpected costs to care for a family member as top worries about retiring early.

report. "Customer-obsessed companies have the largest median three-year sales growth, higher margin performance and happier employees."

Retailers who have succeeded in optimizing the purchase journey for their shoppers have reported greater efficiency within their marketing department (63 percent), better innovation (58 percent) and improved customer satisfaction scores (49 percent). Worryingly, however, Forrester says that only 18 percent of the retailers surveyed have seen revenue growth as a result of their personalized marketing strategies.

To see better business outcomes from marketing efforts, Forrester and Listrak claim consumers should move beyond traditional e-mail marketing tools like shopping cart/browse abandonment and transactional messaging, which is used by 70 and 69 percent of retailers, respectively. Instead, the firm believes retailers will find more value by tracking key metrics like customer lifetime value, acquisitions, engagement and conversions to optimize their e-mail and digital marketing efforts.

••• IT research

Integration challenges stymie digital efforts

IT groups can't keep up with demand

A global survey of IT leaders found that while 97 percent of organizations are currently undertaking or planning to undertake digital transformation initiatives, integration challenges are hindering efforts for 84 percent of organizations. Close to half of all respondents (43 percent) reported more than 1,000 applications are being used across their business but only 29 percent are currently integrated together, trapping valuable data in silos.

The survey of 650 respondents, conducted to help create the 2019 Connectivity Benchmark Report on the state of IT by application network platform MuleSoft, San Francisco, also reveals that IT is struggling to keep up with business demands, as 64 percent of respondents indicated they were unable to deliver all projects last year. In addition, project volumes are only expected to grow, with respondents predicting on average a 32 percent increase this year. If digital transformation initiatives aren't successfully completed, nine out of 10 organizations believe business revenue will be negatively impacted.

Among the key results of the survey:

The IT delivery gap is widening as new technologies enter the scene. The role of IT is changing from a tactical function to a business catalyst. However, the business' growing need for IT support is reflected in the increasing number of projects IT is expected to deliver. In addition, with a growing investment in new technologies, organizations are seeing integration challenges hinder digital transformation initiatives. Eighty-four percent of respondents claim integration challenges are slowing digital transformation progress. In particular, data silos created business challenges for 83 percent of respondents.

"Legacy infrastructure and systems" was the most frequently reported challenge to digital transformation. Furthermore, 59 percent of IT leaders say their legacy infrastructure makes it hard to introduce new technologies like artificial intelligence, big data and the Internet of Things.

The majority (69 percent) of IT's time remains dedicated to keeping the lights on compared to innovation. Further compounding the issue, 77 percent of respondents saw a budget increase of less than 10 percent this year. In fact, nearly one-third (31 percent) of these respondents reported that budgets had either remained flat or decreased.

IT's new role as a business catalyst. IT's expanding role is driven by a greater need for support across lines of business. As companies race to digitally transform, what was once an IT-specific need for integration has now expanded to business units across the organization. Ninety-two percent of respondents say their company's integration needs span beyond IT to encompass a wide range of business functions, including business analysts (49 percent), data scientists (42 percent), human resources (37 percent) and marketing (36 percent).

IT and business leaders are more aligned than ever before. Respondents who identified business and IT misalignment as a major challenge dropped from 43 percent last year to 29 percent this year. The alignment between IT and the business goes as far as sharing key performance indicators. Of the respondents currently undertaking or planning to undertake digital transformation initiatives, more than three-quarters (77 percent) cite increased business efficiency as a goal this year and 71 percent cite improved customer experience as a goal.

Preparing for the future one API at a time. For IT to become a business enabler, organizations are increasingly turning to API strategies to support reuse and self-service. By creating reusable assets, IT enables the business to increase overall delivery speed and capacity. Ninety-one percent of respondents from organizations that own public and/or private APIs are experiencing significant business outcomes as a result, including greater productivity (53 percent), decreased operational costs (33 percent) and increased revenue growth (29 percent). For 36 percent of respondents, APIs are generating more than 25 percent of their organization's revenue.

Respondents who manage their APIs like products were more likely than their peers who own APIs to report increased innovation (49 percent versus 40 percent) and greater agility across teams to self-serve IT (58 percent versus 46 percent).

Respondents who always reuse software assets when developing new projects were more likely than their peers who own APIs to report increased productivity (63 percent versus 53 percent) and revenue growth (41 percent versus 29 percent).

The survey was commissioned by MuleSoft and carried out by Vanson Bourne. A total of 825 IT decision makers were interviewed in December 2018 across the U.S., U.K., Germany, Netherlands, Australia, Singapore, China, France, Japan and Hong Kong. To allow year-on-year comparisons, all statistics cited here exclude 175 respondents representing France, Japan and Hong Kong who were not interviewed for last year's report. Therefore, the statistics here are derived from a base of 650 IT decision makers across the U.S., U.K., Germany, Netherlands, Australia, Singapore and China. The respondents were from enterprise organizations in both the public and private sector with at least 1,000 employees. Interviews were conducted online using a multilevel screening process to ensure that only suitable candidates were given the opportunity to participate.

••• data privacy

Amazon delivers trustworthiness

Social media companies rank last

Consumers are concerned about the privacy and security of their data, yet still want a more personalized experience from brands, according to a survey of more than 1,000 consumers from SmarterHQ, a multichannel behavioral marketing platform. The survey was undertaken to determine which companies and industries are handling their users' data responsibly and which marketing tactics consumers feel are personalized versus creepy.

According to a report based on the survey, Privacy & Personalization: Consumers Share How to Win Them Over Without Crossing The Line, Amazon has earned the most trust from today's consumers by a landslide – 48 percent of consumers trust Amazon to use their data responsibly, beating out banks, Apple, Google, other big brand stores, airlines and hotels. This sentiment is strongest among Millennials and Generation Z, who trust Amazon 2.1x more than their banks. Social media companies rank last on the list at 6 percent, with one major contributor to this low score being that half of survey respondents said they know someone who has had their social media account hacked.

"Digital marketers today face the challenge of confronting consumers who are increasingly skeptical of whether they can trust brands with their data and wonder if their personal information will be used wisely," says Michael Osborne, president and CEO of SmarterHQ. "The encouraging news is that 90 percent of consumers are willing to provide behavioral data for a better shopping experience as they demand a personalized touch from the brands they interact with. Therefore, the onus is on marketers to leverage the right technology to help them recognize, understand and engage with their audiences across all channels while keeping their customer data safe. This will give brands the best chance at gaining a loyal customer base. There's a difference between personalized and creepy marketing tactics and marketers need to make sure their campaigns fall into the right category."

Among some of the other consumer findings in the report:

They're skeptical: 86 percent are concerned about their data privacy and 79 percent of consumers believe companies know too much about them.

They favor e-mail over other channels: 51 percent of consumers say e-mail is the best way for a brand to communicate, with social media second in line (25 percent).

They think push notifications can be creepy: 74 percent of consumers say push is the most invasive channel because they view their phone as an everyday tool that's part of their personal space.

They'll banish brands who provide poor personalization: 63 percent say they would stop purchasing products and services from companies that take "creepy" marketing too far.

They value and trust brands the more often they shop and the younger they are: Those who shop more often find personalization marketing tactics 25 percent more helpful and Millennials and Gen Z trust companies with their data 47 percent more than Baby Boomers and Gen X. Interestingly, owners of smart home devices (i.e., Amazon Alexa, Google Home) are 16 percent less protective of their data privacy and 12 percent more trusting of companies collecting and using their data.

Q IN FOCUS

Product and Service Update

••• shopper research

Methodology gets real with shoppers

Incorporates AI, biometrics

Teaneck, N.J., shopper insights firm PRS IN VIVO has launched Next Generation In-Context Research, a methodology designed to provide a better understanding of real shopper behavior to influence consumer choices that have a real-world impact on business results. The aim is to analyze how shoppers interact with products in real environments, what influences shoppers' purchase behaviors and help determine how to design choice architectures in order to win in every retail channel. Next Generation In-Context Research aims to provide answers to these questions in a behavioral framework that is flexible, modular and simple to implement. The method incorporates new technologies to improve decision-making: AI to predict outcomes; a biometric bracelet to measure emotion; and enhanced eye-tracking and video journey-mapping. In addition, every project can include an e-commerce module.
www.prs-invivo.com

www.quirks.com/articles/2019/20190404.aspx

••• ux research

UserZoom aims to boost user research studies

Suite of UX product enhancements

San Jose, Calif., UX insights company UserZoom has released enhanced product functionality to help customers build and analyze user research studies. The company redesigned its Study Builder, making it easier to create UX tests on a range of devices. The addition of the star rating question type allows researchers to more easily align satisfaction questions with how their organization measures satisfaction and experience ratings. Enhancements to Results Beta, which allows customers to extract and share UX insights from studies, include the addition of the full breadth of question types to the new Results Beta visualizations and new filtering capabilities that include the ability to filter by rating scale responses. UserZoom has also released Video Transcripts, which includes features like dynamic scroll, enhanced search, clip creation and text export.
www.userzoom.com

••• panel research

New platform from P2Sample

Offers provider integration

Alpharetta, Ga., sampling solutions firm P2Sample has launched its new platform, an automated solution for panel management and fieldwork. The platform offers: a single system to manage proprietary panels and programmatically integrate with more than 200 sample providers, with connections to panel companies, exchanges and marketplaces; interfaces and intuitive flows that allow management of sample across the entire project lifecycle, from bidding/quotation to field to delivery for quota setups, feasibility estimates and faster launches; integration with and ability to blend sample from more than 200 providers; access a global audience of respondents; no additional platform or software licensing fees; integration with traditional and custom data collection systems and multiple methodologies, including eye-tracking, facial coding, nonconscious measurement, video capture and traditional surveys; and proactive automated alerts and real-time reporting to ensure projects stay on track.
www.p2sample.com

••• ad research

Nielsen initiative targets smart TVs

Focuses on addressable advertising

Nielsen, New York, has launched Nielsen Advanced Video Advertising, a new technology, product and commercial initiative that will focus on expanding and innovating addressable advertising for smart TVs. The smart TV landscape has the potential to usher in a gold rush for marketers, programmers and OEMs. There are more smart TVs in the market today than ever before and more than 250 million expected by 2023, according to Statista. With more devices capable of delivering addressable TV advertising, similar to the digital world, Nielsen identified the need for an end-to-end, AI-optimized platform that enables ad delivery, data-driven targeting, automation, real-time optimization, unified campaign management and measurement. To further accelerate the initiative, Nielsen has acquired Sorenson Media, an addressable TV technology company.
www.nielsen.com

••• media research

Unilever spearheads development of cross-media measurement model

Engages World Federation of Advertisers, others

London-based consumer goods company Unilever has announced an initiative to build a cross-media measurement model to help brands measure and understand campaign impact across the media landscape. The company has engaged the World Federation of Advertisers (WFA) and other industry bodies to invite other brands, platforms and publishers to join in efforts to further develop the measurement system. Unilever is leading the effort to develop a model that will combine existing industry measurement tools into a system that measures campaign audience, audience reaction, campaign impact and sustained impact over the short-, medium- and long-term.

"To realize our vision of a more transparent and high-quality digital ecosystem, our partnerships have been, and will remain, instrumental in developing an always-on, privacy-safe model for cross media measurement," said Keith Weed, Unilever CMO, in a press statement. "We are hugely encouraged that our digital and measurement partners worked with us to enable these significant steps towards solving the challenge of holistic media measurement. This represents a genuine willingness across the industry to find creative, effective solutions to shared issues. We look forward to welcoming other leading advertisers and industry associations to the initiative to help address this industry challenge."

"Unilever has always been a champion of key industry-wide initiatives," said Carolyn Everson, Facebook vice president of global marketing solutions. "It's important that we and others work toward a cross-media measurement solution – one that leverages independent third-party systems, protects privacy and improves people's experience with ads."

www.unilever.com

••• research education

Three new online courses from MRII

Qual, emerging methods, analytics

The Market Research Institute International, in cooperation with the University of Georgia Center for Continuing Education, has launched three new online courses.

Qualitative Market Research is designed to give you the foundational knowledge necessary to properly utilize qualitative approaches that yield valuable insights. This online course is PRC approved for nine hours.

Emerging Methods and the Future of Market Research explores how evolving technological, social, scientific, economic and cultural forces are redefining how market research is designed and conducted. This online course is PRC approved for 12 hours.

The bundled course Analytics 1-2-3 includes three Principles Express courses – Introduction to Data Analysis, Advanced Analytic Techniques and Working with Secondary Data: Syndicated and Big Data. This bundle will help students learn how to prepare data for analysis, select the most appropriate statistical methods and develop an analysis plan to support the business decision that needs to be made. Also covered will be the many secondary data sources now available, including the increasing availability of syndicated data and big data. This online certificate course is PRC approved for 36 hours.

www.georgiacenter.uga.edu/courses/market-research

••• Briefly

■ New York-based qualitative research firm First Insights has launched the UX Research Podcast, which aims to provide insights, strategies and best practices around how to conduct research in an increasingly digital world. New podcasts will be posted on a regular basis and UX and research communities are invited to reach out with ideas and commentary.

www.firstinsights.com

■ Chicago-based researcher IRI and Irvine, Calif., mobile research firm MFour have partnered to launch IRI OnSights, a solution that leverages MFour's first-party GPS location information to collect data on consenting mobile panelists' visits to U.S. bars and restaurants. The data provides IRI clients with passive tracking insights and actively collected survey information to improve marketers' understanding of consumer behavior.

www.iriworldwide.com
mfour.com

■ Data science company Dstillery, New York, has introduced Audience Studio, a platform that allows users to onboard first- and third-party data to create custom audiences, explore physical and behavioral attributes and activate in Dstillery's DSP or their preferred DSP. The launch comes after a private beta test with various agencies.

dstillery.com

■ Toronto-based data services firm Maru/Blue has launched its Ailments Community, which profiles members from across the U.S., Canada and the U.K. who suffer from or have been

diagnosed with a variety of ailments. Patients and caregivers are included in the sample. The community can be used for quantitative and qualitative research and includes mobile missions and video interviewing.
www.marublue.net

■ Detroit-based online qualitative technology company Aha! has released its multi-day TruRotation ad/concept testing feature as part of its suite of market research tools. Using a proprietary algorithm to rotate ideas equally over multiple days, TruRotation allows insight strategists and researchers to deliver a randomized but exact balance of idea presentations for qual/quant ad, concept and idea testing for consumer and B2B research studies.
ahaonlineresearch.com

■ In London, data services firm Maru/Blue has launched its Maru Voice UK Omnibus, a solution that allows clients to test an idea, message or concept among U.K. citizens. In Toronto, Maru/Blue has launched its Hispanic Omnibus, a solution that allows clients to test an idea, message or concept among the Hispanic population.
www.marublue.net

■ Encino, Calif., sampling company InnovateMR has released new features for its self-serve platform Pegasus. The updated platform allows clients to field international projects and receive instant feasibility and pricing in the U.K. and Canada. Clients can also identify audiences with new, easy-to-use targeting, create census rep targeting and quotas, create custom screening questions and see real-time updates to feasibility and pricing as they build a target audience.
www.innovatemr.com

■ Los Angeles-based research automation platform PureSpectrum has launched Storefront, an automated insights e-commerce platform. Storefront automates survey creation with custom configurable inputs, data collection and report generation, allowing researchers to return insights to clients within 24 hours. It also includes access to respondents from the PureSpectrum marketplace.
www.purespectrum.com

■ Plano, Texas, data services firm Dynata is offering a joint solution through a strategic alliance with marketing technology company TruSignal Inc. Through the alliance, brands can use selected segments from survey responses collected through Dynata as seed data to help audience expansion. TruSignal uses the seed data segments to train its AI-powered predictive scoring engine to identify lookalike audiences at scale. Powered by TruSignal's Tru-Audience Platform, 247 million U.S. adults are scored based on cross-validated, people-based offline data spanning 16 categories.
www.dynata.com
www.tru-signal.com

■ Irvine, Calif., mobile research company MFour has introduced DisplayCheck, which provides researchers with validated ad effectiveness metrics derived from first-party mobile shoppers who have been naturally exposed to in-store displays, signage and end caps. The product tracks all store visits of double opt-in mobile consumers and sends them exit surveys immediately after they've left a store where the campaign being measured is under way.
mfour.com

■ Research company Curion has launched eFive, a sensory and product insights platform designed for emerging brands, with testing facilities in Chicago, San Francisco, Dallas and New York City metropolitan areas.
curioninsights.com

■ Toronto-based consumer intelligence firm Maru/Matchbox has launched the Cannabis Chronicle, a quarterly study measuring cannabis consumption patterns, changing cannabis perceptions and attitudes, brand awareness, consideration and satisfaction and other topics impacting the cannabis industry. The study is conducted in Canada and in U.S. states where cannabis is legal for recreational consumption.
marumatchbox.com

■ Columbia, Md., marketing agency Merkle has launched Rapid Audience Layer, a public, cloud-based marketing data management solution that integrates multiple data sources to deliver audience insights. Powered by Merkle's Connected Recognition technology, the solution offers standard data hygiene and identity resolution, allowing marketers to recognize the same individual across several data sources.
www.merkleinc.com

■ Consumer insights firm MetrixLab has released Campaign Monitor, a multimedia campaign effectiveness solution. Campaign Monitor measures the performance of individual media channels as well as the performance of the individual platforms and placements within those channels. The solution can also assess the impact of campaigns on different audience groups.
www.metrixlab.com

■ InContext Solutions, a Chicago-based provider of 3-D simulation software for retail, has launched its second-generation decision-support platform ShopperMX. The platform simulates in-store shopping experiences within a virtual store environment, testing them with real shoppers. It supports use cases such as packaging design; micro and macro space planning; trade promotions; display and signage fixtures; and more. The updated platform includes a new back-end infrastructure, an improved user interface and new capabilities for collaboration.
www.incontextsolutions.com

■ London-based researcher Kantar Worldpanel has launched a consumer panel in Bangladesh, with services covering 5,150 households. Kantar Worldpanel will join with Kantar MRB, enhancing the household panel that has been in the country since 2002. The panel will cover 53 categories including new and fast-growing categories such as air fresheners,

toothbrushes, chips, puffed snacks and biscuits, among others. The company will also provide its portfolio of analytical services that support clients' decision-making in areas like retail strategy, media investment and innovation.
www.kantarworldpanel.com

■ Virtualitics, a data analytics and visualization company based in Pasadena, Calif., has announced a new release for its flagship product, Virtualitics Immersive Platform, to support more use cases for a variety of industries. The software uses AI to identify key insights in the data, while visualization provides a way to represent the data and explain AI findings through desktop or coupled with virtual reality.
www.virtualitics.com

■ Boston-based digital experience intelligence firm Decibel has released Journeys, which provides a view of how Web site and app users experience every step of the online journey.
www.decibelinsight.com

■ Cambridge, Mass., natural language company Luminoso has launched Score Drivers, a machine learning-powered solution that automates the process of finding drivers in qualitative and quantitative feedback from customers and employees. The solution analyzes unstructured reviews and survey feedback and shows how the unstructured data correlates with quantitative ratings.
luminoso.com

■ San Francisco-based technology firm Insights Curry has launched its first product, MAXDIFF OPTIMINER, a cloud-based solution for max-diff research, including advanced design modules, optimization bundling and TURF analysis.
www.insightscurry.com

■ Software company Qualtrics has launched XM Controls, a suite of data protection and governance capabilities to help organizations comply with the latest global data protection and security policies. The capabilities will allow XM program managers to manage users, permissions, data, compliance, security and costs when building customer, employee, product and brand experience solutions on the Qualtrics XM Platform. The company has also added a series of new product enhancements to Qualtrics Research Core.
www.qualtrics.com

■ New York-based research and analytics firm M Science has launched SWIPE UK, which provides daily updates on consumer spending metrics. SWIPE UK, with indices on spending, unique shoppers, transactions and average ticket, includes 54 merchants across 30 publicly traded companies and complements SWIPE US.
www.mscience.com

It's amazing what you can learn in 15 seconds

| By Albert Fitzgerald

snapshot

A case study of what happened when two groups of respondents were given limited and unlimited exposure to a product concept.

Contrary to what we may logically assume, studies of brain activity show that decision-making tends to be handled by subconscious mental processes. Yet classic market research techniques tend to only measure conscious thought.

To measure subconscious thoughts, researchers have developed a range of physiological and neuroscience tools like: expression analysis; eye tracking; electroencephalogram (EEG), which is a test that detects electrical activity in your brain; galvanic skin response (GSR); heart rate; respiration; voice analysis; fMRI or functional magnetic resonance imaging, which measures brain activity by detecting changes associated with blood flow; and limited time exposure.

Why is so much time being spent studying neuroscience tools? Many now believe that to fully understand how consumers make decisions, we need to gain a window into the subconscious and neuroscience tools are seen as a way to do that. But most all of these techniques can be either impractical or costly and difficult to implement because they typically require special laboratory settings – except one!

Limited time exposure is a technique that shows great potential for measuring subconscious thought. It is practical, cost-effective and implementable via Web-based surveys.

To investigate and illustrate its application, we conducted a survey with 400 consumers divided into two groups: Group A saw a product description for 15 seconds; Group B could look at the product description for as long as they liked.

With the Web-based survey platform we used (SurveyGizmo), you have the ability for someone to see a screen for a set amount of time and to randomize which questions people see. So we created two questions. Question one showed the product description on the screen and there was a timer so the screen went away after a fixed time (15 seconds). Question two showed the product description and when the respondent had finished reading it there was a [NEXT] button they clicked to go to the next question. Again, they could view the product description for as long as they liked.

Figure 1 shows the product description that both groups saw.

Group A and Group B were asked to rate attractiveness and likelihood to buy. When we compared the results between Group A and Group B they were identical. Respondents made decisions about the coffeemaker concept extremely quickly. And giving them unlimited time did not change their impressions of the concept.

Think about it: In 15 seconds people were able to grasp the concept, decide if they would buy and describe the concept back to us.

Group A and Group B were asked to tell us the message or key idea of the concept. While each group found the concept equally attractive, the key takeaways were different: Group A (limited time) tended to give us just the facts while Group B (unlimited time) tended to give more benefits and opinions of the coffeemaker.

How were the messages different?

Group A (limited time) tended to write basic de-

www.quirks.com/articles/2019/20190405.aspx

scriptions and gave us five key takeaways:

What is it? "A coffee maker."
What does it do? "Makes perfect coffee."
How? "Uses handprint recognition."
That it identifies you: "Customized."
Some aesthetics feedback. "Futuristic-looking," "sleek."

Group B (unlimited time) tended to give opinions and benefits.

"I like the idea."
"Interesting."
"Revolutionary."
"Futuristic approach."

In terms of benefits, we saw comments that were not even mentioned in the product description such as:

"Personalized coffee at home instead of going to a coffee shop."
"Saves lots of time."
"Right temperature and taste."

Figure 1

Memorizing the right cup of java

Memory is a coffee maker that uses handprint recognition to make the right cup of coffee for the right person. Set it to your preference of weak, medium or strong coffee or even an espresso. Each time be assured of your favorite blend as **Memory** will remember your preference accurately. A simple hand scan is all it needs. (See the two photos below.)

Miss critically important thoughts

Typical market research can miss critically important thoughts and consumer impressions. Why? Because by giving respondents unlimited time to review concepts we are focusing on conscious thought processes.

Our experiment showed us that people tell us different things about a product depending on how much time we give them to think about it. Yet both groups found the product equally attractive.

Giving respondents limited time told us the key messages that resonate about the product and gave us a peek into the subconscious and what motivates decision-making.

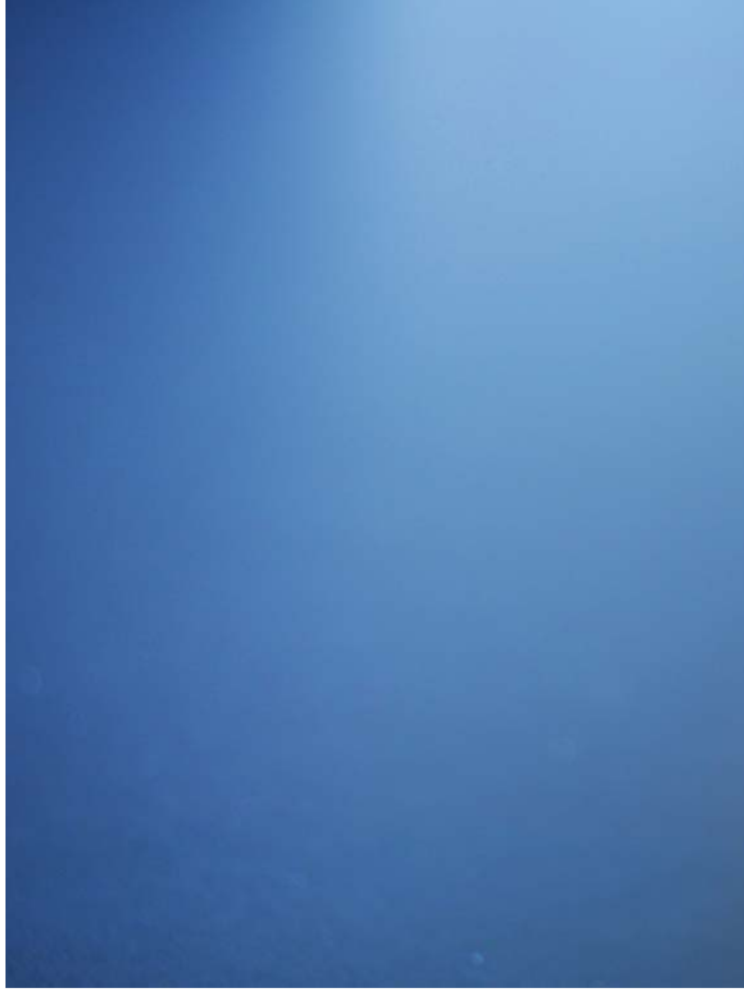
Giving respondents unlimited time tended to give us intellectualized responses that made it hard to tell what really drives the decision and thoughts and ideas from the rational, thinking part of the brain.

Some refer to these systems of thought as System 1 (subconscious thought) and System 2 (conscious thought). We gain insights from both and we think we need both to understand customer insights. Customers make gut-level, subconscious decisions quickly. And in this study we find that giving more time does not change these decisions.

Neuroscience tools are evolving but are often impractical. But limited time exposure is a quick, practical, cost-effective solution. To understand customer motivations, we need to understand both conscious and subconscious thoughts. Subconscious (using limited time exposure) shows what drives decisions. Conscious (providing unlimited time) gives deeper interpretive opinions and beliefs.

This is not a proprietary approach, just a very clever idea. We did this as a test study and paid for all recruitment so that it was not proprietary to any of our clients. We used an online Web-based survey platform (SurveyGizmo) to implement the survey but any Web-based platform could have been used. As long as you use survey-hosting software with the ability to limit the amount of time someone sees a question (in our case a product description), then you can easily implement a survey like this. Why not conduct some research-on-research and see if it works for you too?

Albert Fitzgerald is president of Visions Research, Rancho Santa Fe, Calif. He can be reached at al.fitzgerald@visionsresearch.com.



••• health care research

What's fair?

The fair market value dilemma in health care research

| By Lynn Clement and Chris Claeys

snapshot

The authors offer evidence-based guidance for determining fair market value for incentivizing health care professionals who participate in marketing research.

www.quirks.com/articles/2019/20190406.aspx

Fair market value (FMV) is a challenging issue, complicating the research process and can be felt at every level of our industry. As the demand for insights increases, the pressure to control clinician compensation has also increased. This has led to a fragile push and pull; with increased demand and declining response rates, market research and sample partners are often forced to undertake complex recruits with declining or highly variable incentives. Hence, we are faced with unanswered questions, such as, what is the impact to the insights we gather? What is the impact to our industry overall? What can we do as an industry to protect our most valuable asset and ensure the integrity of our data and insights? What is fair market value?

Fair market value is the price, expressed in terms of cash equivalents, at which property would change hands between a hypothetical willing and able buyer and hypothetical willing and able seller, acting at arm's length in an open and unrestricted market, where neither is under compulsion to buy or sell and when both have reasonable knowledge of the relevant facts[1].

The three universally accepted approaches to determining FMV are[2]:

The **market approach** or "a general way of determining a value indication of a business, business ownership interest, security or intangible asset using one or more methods that convert anticipated economic benefits into a present single amount."

The **cost approach** or "a general way of determining a value indication of an individual asset by quantifying the amount of money required to replace the future service capability of that asset." The cost approach is based upon the principle of substitution or the premise that a prudent individual will pay no more for a property than he/she would pay to acquire a substitute property with the same utility.

And finally, the **income approach** or "a general way of determining a value indication using one or more methods that compare the subject to similar businesses, business ownership interests, securities or intangible assets that have been sold."

than a quantitative study. Per-minute compensation should be higher than a quantitative study.

Input required. The complexity of the research study warrants consideration. A tracking study, standard message testing or simple rating and ranking exercise is less demanding than a more rigorous conjoint or choice exercise study.

Expected or required time. An easy 10-minute quantitative survey can offer a low incentive and still be attractive. As the time commitment increases to 30 minutes or longer, participation and interest drops. A straight-line increase in incentives corresponding to the time commitment will not optimize quality or participation rates.

Quota size vs. population size of specialty. One challenge that most clients fail to consider is the screening criteria and their impact on recruitment and participation. If you are targeting oncologists with minimal screening criteria and a high qualification rate (75 percent or above), a lower incentive may be acceptable. However, if you layer on multiple screening criteria and the incidence rate is low (<20 percent), you may need to screen through many oncologists to achieve your desired completed interviews. As such, you should consider increasing the incentive to maximize the response rate to achieve your goals.

Requirement to use a manufacturer target list. Most market research studies are completed using online panels, a group of physicians who have opted in to participate in research. When the universe is limited to a specific target list, we are limiting the number of targets within a panel that can be sampled. The impact is a much smaller group of clinicians to target. This either requires more custom recruiting using non-panel approaches, optimizing the response rate to the invitation by increasing the honoraria to make the research opportunity more attractive or both.

How often a specialty is researched. We have seen a trend in additional demand for non-traditional respondent types, like biomedical engineers, lab managers, quality staff, care managers, compounding pharmacists, procurement managers, etc. The challenge is that these folks historically have not been heavily researched or empaneled and, as a result, are much harder

Still complex

For our industry, the market approach is the most reasonable but it is still complex. Arrangements are typically quite diverse and may not offer perfect comparables. While there are vendors that specialize in assisting manufacturers with determining FMV, they typically focus on consulting engagements, not market research, where the value of their insights is difficult to quantify.

Currently, there is no universal standard or methodology for determining FMV for market research due to the complexities and variance of study design and respondent requirements. Each supplier and manufacturer sets their own FMV, balancing study criteria and response rate. The overarching goal in developing FMV is to identify and limit potential conflicts of interest, without compromising the integrity of the research.

Since there is no standard approach, each manufacturer undertakes the process differently, yielding diverse results. In addition to highly variable FMV rates across manufacturers, we see several other distinct challenges such as: rates that were developed many years ago and are not adjusted for inflation or other market factors; tiered incentives for respondents with differing credentials or years of experience within the same study and the approach of one standard hourly rate whereby the actual honorarium is calculated based on the time commitment with no adjustments for methodology, incidence rate or universe size.

When creating your fair market value guidance, it is important to steer away from one standard hourly rate. While it is impossible to determine FMV guidance for every possible research commitment, your FMV guidance should take into consideration several important engagement factors that impact participation rates:

Type of study or methodology. A typical qualitative interview or focus group is a more intensive research commitment, with a structured interview time, requiring a different and deeper level of focus and engagement to recruit. Although their feedback is desired, typically the incentives offered are lower than what we see for doctors. This, compounded with access challenges, makes it critical to optimize the response rate to a research invitation.

You also shouldn't forget clinician variables either, such as: education and specialized training; professional certifications; leadership experience; academic appointments; research experience; publications; thought-leadership activities and reputation in the community. If you desire a respondent with highly specialized skills or credentials, your honorarium amount should be adjusted accordingly to ensure recruitment feasibility. Clinician factors are the most difficult to assess in a market research environment and create the most significant challenges for recruitment.

So, overall, what is the impact of declining and highly variable FMV rates?

- Low response rates, in an industry where the response rates have historically been declining.
- Achieve less than desired number of completed interviews.
- Longer field period to achieve the desired number of completed interviews.
- Potential for respondent pool to be less representative of targets than desired due to selection bias because of the offered honoraria.
- Vendor masking of actual incentive amounts to ensure they can meet the desired number of completed interviews (rolled into recruit fee, travel stipend, etc.). This creates a lack of transparency in a highly competitive market, representing an ethical dilemma. Masking incentive amounts does not support the greater cause of fair compensation for clinicians. If we cannot prove the FMV rates of a manufacturer are too low, we are not assisting our client partners in making the case for adjusting them.
- Panel partner refusal to conduct the recruit due to the impact on panelist relations from offering below-market-rate honoraria.

Overall this leads to suboptimal outcomes that impact the quality of the insights and client confidence in decision-making and strategic direction. Due to these issues, we decided to conduct an in-depth study of FMV rates. The key questions we sought to answer were:

How do doctors expect to be compensated for different types of research engagements? Our hypothesis: Doctors will want to be compensated more per minute for qualitative studies than quantitative studies. Fair market value rates for qualitative research will not be in line with what doctors expect, resulting in lower participation rates.

Is the average FMV rate adequate to achieve an acceptable level of participation (75 percent) in each type of research study? Our hypothesis: Participation at the average FMV rate will be lower than the acceptable level of 75 percent.

Does specialty, years in practice, practice type, frequency of participation in market research or thought leadership impact willingness to participate at different incentive levels? Our hypothesis: All of the above will impact willingness to participate, with younger, less-experienced doctors more willing to participate at lower incentive levels.

And lastly, **are clinicians more willing to participate in certain types of research engagements than others?** Our hypothesis: Clinicians will be more willing to participate in quantitative research and shorter, less-involved research engagements, both quantitative and qualitative in nature. Specialists will be less willing to participate than primary care physicians (PCPs).

Methodology

To test these hypotheses, we developed a questionnaire that elicited likelihood of participation in varying market research studies at varying incentive amounts among cardiologists, neurologists, orthopedists, oncologists and primary care physicians (family practice, general practice, interal medicine. On average, the questionnaire was five minutes in length and fielded August 15-23, 2018. We recruited from a convenience sample randomly drawn from Survey-Healthcare's online panel. In total, 87,311 pieces of sample were sent, with 625 physicians responding and 425 completing the survey. Initially, respondents were not offered an incentive for completion; however, a small $10 incentive was offered toward the end of fielding to achieve the necessary sample size for neurologists and oncologists. To qualify for the research, respondents had to be a physician in one of the qualified specialties with more than one year in practice. Sub-quotas were developed and monitored for years in practice, to ensure adequate representation.

The questionnaire specifically tested receptivity to varying incentive amounts for five types of market research studies: 1) 15-minute online quantitative ("Quant 15"); 2) 25-minute online quantitative ("Quant 25"); 3) 40-minute online quantitative ("Quant 40"); 4) 45-minute qualitative telephone IDI ("Qual 45"); and 5) 60-minute qualitative in-person IDI ("Qual 60"). Incentive amounts varied for each specialty within each study type, with higher incentive amounts offered for studies requiring a greater time commitment. Exact incentive amounts (Table 1) were determined as a range (±50 percent, ±25 percent) around our clients' average FMV rate for each specialty by study combination; the middle price point was always the average FMV rate. To elicit participation likelihood, a Gabor-Granger[3] exercise was utilized. (Gabor-Granger is a sequential monadic method typically used for estimating price elasticity of a product or service. In this application, we used it to estimate incentive elasticity of market research participation.)

For each study type, respondents were shown a description of the study they'd be participating in, one of the five incentive amounts (randomized) and asked if they would participate. If they responded yes, they were shown a lower amount, if they said no, they were shown a higher amount. This repeated until the respondent reached either the end of the incentive range or until their reservation amount was reached. The order in which respondents were shown the five market research studies was randomized to avoid bias.

To formally test the impact of incentive amount on participation given study type and physician specialty, an analysis of variance (ANOVA) was utilized with reservation price as the dependent variable and study type, physician specialty and starting incentive amount as the independent variables. Given this analytic plan, sample sizes

Table 1: Tested incentive amounts by study type and physician specialty														
Quant 15			Quant 25			Quant 40			Qual 45			Qual 60		
C/N/O	On	P	C/N/O	On	P	C/N/O	On	P	C/N/O	On	P	C/N/O	On	P
$30	$40	$25	$50	$65	$45	$80	$105	$70	$90	$120	$80	$115	$155	$110
$45	$60	$40	$70	$100	$65	$115	$160	$100	$130	$175	$115	$175	$235	$155
$60	$80	$50	$95	$130	$85	$155	$210	$135	$175	$235	$155	$230	$310	$205
$75	$100	$60	$120	$160	$105	$195	$260	$170	$220	$295	$195	$285	$385	$255
$90	$120	$75	$140	$195	$125	$230	$315	$200	$260	$350	$230	$345	$465	$300
C/N/O = cardiologist, neurologist, orthopedist; On = oncologist, P = primary care physician														

for the five physician specialties were determined apriori as n = 85 to provide adequate statistical power (80 percent). Due to sampling restrictions, our final sample sizes were close to this requirement with n = 84 for cardiologists and orthopedists, n = 86 for neurologists and oncologists, and n = 85 for PCPs.

Additional hypothesis testing on physician years in practice (1-15, 16-30, 31+ years), practice type (hospital, office, other), frequency of participation in market research in the past 30 days (zero studies, one-to-two studies, three+ studies) and thought leadership (potential key opinion leader/key opinion leader) were not considered in the determination of sample sizes since these factors could not be sampled to and therefore, could not be balanced and were not used in the designed experiment. These factors were tested using an f-test, in a more exploratory nature and independent of other factors.

Table 2: Analysis of variance results				
Parameter	Degrees of Freedom	f-value	p-value	Cohen's f
Physician Specialty	4	12.402	< 0.001	0.154
Starting Incentive	1	603.253	< 0.001	0.537
Study Type	4	93.489	< 0.001	0.423
Physician Specialty x Starting Incentive	4	4.613	0.001	0.094
Physician Specialty x Study Type	16	0.559	0.915	0.065
Starting Incentive x Study Type	4	2.324	0.055	0.067

Table 3: Average (min, max) participation rates across specialties for the lowest, average and highest incentive amounts by study type			
Study Type	Lowest Incentive	Average FMV	Highest Incentive
Quant 15	51% (42%, 60%)	89% (87%, 92%)	99% (98%, 100%)
Quant 25	45% (38%, 58%)	87% (79%, 92%)	98% (95%, 100%)
Quant 40	40% (30%, 47%)	86% (80%, 92%)	98% (96%, 100%)
Qual 45	20% (14%, 31%)	69% (61%, 78%)	96% (90%, 99%)
Qual 60	14% (8%, 21%)	66% (58%, 71%)	95% (93%, 98%)

Results

ANOVA results for the Gabor-Granger data are in Table 2 for main effects and two-way interaction terms. Notably, all main effects are statistically significant, while two-way interactions are largely insignificant and with negligible effect size (Cohen's f). While the main effect of physician specialty is significant it, too, has a small effective size. This indicates that while the incentives physicians expect to be paid varies by specialty, there are no meaningful differences by specialty with respect to the baseline FMV incentives tested in the research. For example, if incentives should be altered, they should be increased or decreased by the same proportion across all specialties.

Post hoc analysis of pairwise differences for study type indicates that higher FMV rates are expected for both 45-minute and 60-minute qualitative studies as compared with 15-, 25- and 40-minute quantitative studies ($p < 0.001$ for all comparisons).

Separate f-tests assessed the independent impact of years in practice, practice type, frequency of participation in market research in the past 30 days and thought leadership. No statistically significant and meaningful differences were found; however, it should be noted that these analyses were under-powered given that we could not guarantee design balance for these variables. Further, our operational categorizations for years in practice, frequency of market research participation and thought leadership were not guided by prior research; it's possible that other operational definitions for these same concepts may lead to different results.

Turning to participation rates (Table 3), we see that the 15-minute online quantitative study has the highest participation rate at the average FMV. As the time commitment increases, participation at the average FMV rate decreases; the higher FMV rates for these studies are not enough to compensate for the time and perceived effort. For all studies other than the 15-minute quantitative study the average participation rate drops below 50 percent at the lowest incentive amount. Further, when comparing the 40-minute online quant versus the 45-minute telephone IDI we see a large difference in participation rates at both the average FMV and lower incentive amounts. While the 45-minute telephone IDI receives a higher incentive for the additional five minutes of time (~$20 on average) this is not enough to compensate for the effort and scheduling commitment required for a telephone IDI. Similarly, while respondents receive a higher incentive for a 60-minute in-person IDI (~$60 on average) we see even lower relative participation rates as compared with a 45-minute telephone IDI; the additional incentive is incongruous with the additional time commitment. Lastly, we see that participation rates meet the 75 percent threshold at the average FMV for quantitative studies but not for qualitative studies.

Discussion

Expectations for incentives are substantially different between qualitative and

Table 4: Required incentives for 75% participation rate by study type and physician specialty										
	Quant 15		Quant 25		Quant 40		Qual 45		Qual 60	
Specialty	Total	Per Minute	Total	Per Minute	Total	Per Minute	Total	Per Minute	Total	Per Minute
Cardiologist	$30	$2.00	$78	$3.12	$142	$3.55	$200	$4.44	$255	$4.25
Neurologist	$45	$3.00	$76	$3.04	$121	$3.03	$189	$4.20	$265	$4.42
Oncologist	$40	$2.67	$93	$3.72	$162	$4.05	$248	$5.51	$344	$5.73
Orthopedist	$51	$3.40	$90	$3.60	$144	$3.60	$203	$4.51	$278	$4.63
PCP	$25	$1.67	$45	$1.80	$97	$2.43	$150	$3.33	$218	$3.63

quantitative; however, current FMV rates are incongruous with this expectation. While physicians are receiving a higher incentive for qualitative studies, the current rate does not maintain the same level of participation as in quantitative studies. By example, a 40-minute quant survey has an average 86 percent willingness to participate while a 45-minute telephone IDI has an average 69 percent willingness to participate – that's with five minutes of extra time and an increased average incentive of $20. The perceived effort and commitment required to participate in a quantitative study is different than that of a qualitative study. FMV rates for qualitative research should be adjusted to optimize participation rates. Importantly, this tells us that a one-size-fits-all approach (one hourly rate for compensation) does not work; so, while we didn't observe large differences for quantitative studies we shouldn't assume that factors like incidence, quota size vs. population size of the specialty, specialty usage demand and list requirements won't affect participation in quantitative studies at average FMV rates.

Further, when evaluating the 75 percent participation rate, it is critical to consider that our results are amongst a convenience sample from an online research panel. Is a 75 percent participation rate the right level of participation to try to achieve? These individuals are already predisposed to participating in market research. We should ask ourselves whether we would achieve this same result in a truly random sample. We hypothesize that participation rates would be lower and therefore, may not meet the 75 percent participation threshold and strongly recommend that manufacturers who have one hourly rate for all methodologies reconsider their FMV guidance.

Even with these limitations, there is opportunity to leverage these results as guidance in determining your FMV strategy. Participation rates cannot be ignored and we must recognize that participation is greatly impacted for qualitative studies given the increased effort required for participation. Our research provides per-minute incentive guidance for our targeted specialties by survey type as a practical guideline to achieve 75 percent participation levels (Table 4).

While this research did not find statistically significant, meaningful differences in participation rates given factors such as years in practice, practice type, frequency of participation in market research or KOL status, it is important to note that our analysis of these factors was limited given our inability to effectively sample based on these characteristics. Further, differences by specialty or role within a health care institution may vary greatly depending on the size of the population we're attempting to sample as well as their overall level of responsibility within the institution; rarer populations and those whose time is worth more may be more sensitive to inadequate incentive amounts. To this end we are reproducing this study amongst a sample of hospital-based health care professionals including: C-suites, procurement, pharmacists, pharmacy directors, nurses/nurse managers and nurse practitioners/physician assistants to provide similar guidance for determining FMV.

Continue to present a challenge

Until we align as an industry on an approach to determining FMV – and what an acceptable participation rate is for market research – it will continue to present a challenge to market research execution. Inadequate incentive amounts lead to potentially biased data, longer fielding times and hesitance from sample vendors to engage in partnerships.

This research was conducted to gain a better understanding of the impact these rates have on physicians' willingness to participate in market research studies and to provide guidance on FMV rates moving forward. In addition to greater flexibility when determining FMV rates to accommodate study complexity and engagement factors, we need to be aware of the varying expectations between qualitative and quantitative studies and stay vigilant of an FMV rate that will guarantee at least a 75 percent participation rate amongst our target population. A one-size-fits-all FMV rate is not an acceptable strategy to uphold the integrity of our insights and ensure that our most valuable resource, our clinicians, continue to provide their valuable input.

Lynn Clement is chief research officer at KJT Group Inc., a Honeoye Falls, N.Y., research firm. She can be reached at lynn@kjtgroup.com. Chris Claeys is the firm's senior director, analytics and consulting. He can be reached at chrisc@kjtgroup.com. The authors gratefully acknowledge Jerry Arbittier and Brian Fischer of SurveyHealthcare for the data collection and their input in the interpretation of the results. They also thank Maria Cristina Antonio of Novo Nordisk for her input on the study design and interpretation of the results.

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health care research

Some healthy change

How Russia, Kazakhstan and Ukraine are adapting to trends in medicine

| By Tatiana Barakshina

snapshot

The author explores the prevalence of selected trends – telemedicine, electronic health records, natural language processing, online customer reviews and the quantified self – in health care in Russia, Kazakhstan and Ukraine.

Medicine is one of those continuously evolving fields. As researchers, one of the joys of doing what we do is to observe the industry developments and trends, to be in the midst of advancement, evaluating and studying how we provide care for people in need.

We see it from several vantage points: from our office in the Chicago area but also from our headquarters in Ekaterinburg, Russia, where we do most of our fieldwork in this space.

I've noticed a handful of hot trends in medicine being actively discussed in the United States. Given where we conduct our research, I wanted to answer the question: What is the view and status of these trends in Russia and Ukraine or Kazakhstan – countries which are geographically, culturally and linguistically connected?

In this article, we'll explore some of those trends across Russia and the region: telemedicine, electronic health records (EHR), natural language processing (NLP), online customer reviews and the quantified self (wearables).

Dial-a-doctor: the role of telemedicine in Russia

While telemedicine has gained popularity within the U.S. health care system only recently, the idea of doctors using this type of communication to consult with patients has essentially been around since the invention of the telephone in the 1870s.

In 1925, Hugo Gernsback, a radio and publishing leader, predicted physicians would use the radio and TV to communicate with physicians (this may have been in part wishful thinking on his end given the industry he was in). In any event, as early as 1960, physicians were connecting with patients via closed-circuit televisions for consultations (a psychiatric institute was connecting with a hospital in this case).

Fast-forward to 2016, when the federal government of the U.S. invested money to use technology to better connect rural veterans to doctors for consultations. Moreover, medical groups use telemedicine as an extension

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of customer service – it is used typically in a consultation and as a form of convenience for patient and doctor. Telemedicine is a widely accepted way of making introductions and connecting patient and medical providers.

Telemedicine can be applied broadly in the following areas: primary health care; specialized medical care; urgent medical care; and palliative medical care.

Russia has created a new telemedicine law to address the growing use of telemedicine to set standards of how it is to be used. It points to the demand for this in some parts of the country (typically in urban centers among a younger generation who is already using technology widely).

The new law permits online consultations including one or several physicians, online patient management and the creation of informational systems containing data about patients. It does not allow for a diagnosis to be made online. Also, importantly, the first visit must be personal for diagnostics.

There are a couple of reasons Russia is both using and addressing telemedicine. The distances between hospitals and the people who need them can be far in some parts of Russia (it is, after all, the largest country in the world by landmass). Online consultations can be many times cheaper than for people to travel to a health care center.

So how are Russians using telemedicine? One way is through a platform called Qapsula. It offers free consultations to patients and includes 3,000 specialists from all regions in Russia. The range of physicians includes everything from endocrinologists to dentists.

A few platforms provide free chat with physicians but the chat is made public. These include Medotvet and Health Mail.ru. Other platforms offer paid consultations. These include Online Doctor and Doc+. The cost comes out to around 800 rubles ($12).

Russian search engine Yandex also offers a special platform known as Yandex.Health. Through this, patients can chat or have audio or video conferences with physicians. Express consultations cost 99 rubles ($1.50) or regular consultations cost 499 rubles (about $7.50). A variety of specialists, along with general practitioners, are available for consultations. The specialists are based in Moscow and have gone through special training courses to consult online.

One final place Russians turn to is a platform called European Medical Centre (EMC). This is different from the other platforms for a couple of reasons. First, the cost is extremely high compared to the others (over 12,000 rubles or $160). But, EMC positions itself as a leading center and a patient can get an opinion from specialists in Russia, Israel, the U.S. and across Europe.

The users of telemedicine in Russia tend to be women as some of the most popular areas are gynecology and pediatrics. It is typically a woman who asks questions about children's health in Russia.

While the pros of telemedicine include the savings of time and money, efficiency in reply time and availability of specialists, others are not using telemedicine in Russia because of some concerns around it. As with any technology including personal information, there are issues about data security. People are concerned that their health data could be disclosed. There is also the obvious boundary of telemedicine not being something where a doctor is physically observing a patient. Moreover, the video or photo quality may be less than ideal, which makes it even harder for the doctor to provide advice. And, as previously mentioned, low availability of Internet in rural areas inhibits the use of telemedicine.

Natural language processing in Russia and the region – hindered by EHR

Natural language processing (NLP) could be critical in helping make health care decisions but there are a number of obstacles before it can really have a major impact in medicine.

As a refresher, NLP is an overarching term to convey when we use computer algorithms to identify key elements in everyday language and extract meaning from unstructured spoken or written input. It is a computer science disci-

A look at how these countries are implementing these medical trends

	Russia	Ukraine	Kazakhstan
Telemedicine	★★	★★	★★
Natural Language Processing	★	×	×
Reviewing Physicians Online	★★★	★★	★★
Quantified Digital Self	★★	★	★

★★★ Well developed and widely used
★★ Gets lots of attention, progress is being made
★ Discussed, but practical implementation is limited
× Not a priority from government standpoint; public doesn't focus on it

pline that requires skills in artificial intelligence, computational linguistics and other machine learning.

It can help with enhance accuracy of electronic health records, provide meaningful medical information through free-text queries and could make documentation easier. But probably the biggest news in how NLP is being used in health care is via IBM's Watson (i.e., used to flag patients with a risk of heart disease). That kind of predictive care could be critical in preventing serious conditions for patients.

Before considering things like natural language processing or AI in medicine, we really need to look at electronic health records. Natural language processing needs sound electronic data to make its mark.

Electronic health records have become the norm in the U.S. and in other western countries. However, the situation is different in Russia. While the history of EHR traces its roots to 2007 when Russia introduced the first electronic program to create digital patient records, more than a decade later the Russian health care system has yet to make a full transition to nationwide EHR. But it appears to be getting close. According to the Russian Ministry of Health, 95 percent of medical organizations are en route to switching to EHRs. In practice, however, it is still very difficult to achieve this goal.

The Ministry of Health is taking steps to standardize medical health records. In January 2019, it announced a special program to create a united medical IT system. However, it's still unclear when EHR will be fully uniform in Russia.

A lack of uniformity is a challenge in Russia as a number of hospitals in major cities like Moscow have an EHR system but one that is different from other hospitals. It makes transferring data from hospital to hospital cumbersome and time-consuming.

The biggest challenge is converting existing patient health records into a unified system. Statistically, people only see a doctor every three or four years in Russia. Beyond the logistical issues, there is also an uphill battle in convincing people that EHR is safer than the current system.

The records of newborns and infants are easier to digitize. One example: the children's polyclinics in St. Petersburg are planning to record all young patients' records electronically this year.

Overall, Russia understands the need to formalize EHR and has put in place plans to do so but the transition may still take some time and it is unclear when the country will truly have a uniform system in place.

Looking at neighboring Kazakhstan, the government there has put a major emphasis on the state program "Informational Kazakhstan 2020," which also includes major development of the medical sphere until 2020. The government plans to launch a uniform EHR system in the whole country, which will require all medical professionals to keep track of their health records electronically. Each patient will also have their own health care number, which will allow any medical institute across the country to access the patient's health record. By the end of 2019, Kazakhstan's goal is to have all hospitals and medical institutions incorporate this new system.

Another neighboring country, Ukraine, is taking a page out of Kazakhstan's playbook and introducing a program that should enable all hospitals in the country to have access to a national database where EHRs will be kept. Ukraine is starting pilot projects in 2019 and wants to digitize all health records by the end of 2020. After that, only EHR will be used, according to the plan.

While both programs in Kazakhstan and Ukraine sound very progressive, they are still in an infancy stage and it is not known whether they will really be launched completely in the next 12 to 24 months as is planned.

So, before looking at implementing natural language processing and AI in medicine, these countries need to first streamline EHR systems and make it the norm.

'How well did I do?' The state of physician reviews

Patient reviews of physicians have become increasingly popular in Russia. Anywhere from 15 to as many as 30 percent of patients in Russia use reviews when choosing physicians. Using reviews in Kazakhstan and Ukraine is less popular, at least for now.

In Russia, there is a positive correlation between the cost of the service and the time spent on analyzing reviews. People who are spending money on physicians choose differently to compare to those being treated at free public clinics. Patients without experience are more likely to be guided by the recommendations of others.

According to Yandex WordStat, there are 113,375 queries per month in Russia containing the words "reviews about physicians."

The number of patients using online reviews is on the rise. From 2016 to 2018, there was a 15 percent increase in the use of online reviews in Russia. Some of the popular websites include ProDoctorov.ru, Napopravku.ru, Yandex Health (in Russia), Med Element (in Kazakhstan) and Otzyvua.net in Ukraine. Russia's largest federal site with reviews, ProDoctorov, has collected more than 1 million patient reviews.

One of the unfortunate consequences of the review system is that some doctors, fearing bad reviews, make decisions based on what the patient wants instead of solely on a medical basis. This is particularly a concern with paid health care offerings.

Moreover, there are cases of deliberate negative reviews being posted due to competition among physicians. In some cases, doctors in Russia have even had to press charges because of deliberate negative reviews.

If the reviews are poor but unbiased, the administration of the clinic typically engages the patient who wrote the poor review. Depending on how many bad reviews there are and the claims, Yandex.Health will remove physicians with bad reviews from its database.

Many patients use online reviews before they choose a physician or to evaluate their current physician after having selected one. This data highlights how important reviews are for both the physician and patient in Russia.

Are digital devices and apps a means to better health?

Smart devices and social media have transformed the way people care for themselves. One trend taking flight across Russia (as it has in other parts of the world) is digital services and apps that both monitor existing medical conditions and maintain a healthy lifestyle.

Let's look at some areas in which digital devices are particularly transforming the way Russians care for themselves.

Devices and apps for diabetics. Noninvasive diagnostics for diabetes involve devices and gadgets that perform measurements without cutting skin or entering the body's space. There are some devices like these available in

Russia but they tend to be expensive. Others have been developed but are not authorized yet. The device isn't the only cost patients accrue with devices like these; they also need to pay for the accessories used with them.

There are two glucose meter models that come in the form of bracelets that are popular among diabetes patients – the Glucowatch and Omelon, a blood pressure and glucose monitor.

The Omelon B-2 is perhaps the best-known noninvasive device used for both adults and children. In addition to measuring glucose levels, the device also measures blood pressure. Its working principle is like a blood pressure monitor but the device also includes a sensor for thermal spectrometry and detecting glucose levels. Results are simply displayed on the device's screen. However, it's not portable.

Another device, known as the Dexcom G5 mobile, measures glucose levels in the interstitial fluid automatically every five minutes. A small, reusable transmitter connects to the sensor wire and sends real-time readings wirelessly to a receiver. It displays both current glucose levels and historical trends for the patient.

Some apps that patients are using in Russia include Diabetes: M, the Glikemichesky Index (Glycemic Index) – which has 467 average daily downloads in Russia – and the Glucose Buddy.

Devices and apps for pregnant women. There are a number of devices and apps that pregnant women across Russia, Kazakhstan and Ukraine use as support during pregnancy. Here are a few devices that stand out:

Kicktrack: This smaller device measures the time between labor contractions and the duration of the contractions themselves, which gives women an approximate idea of when the labor will be over. The device can also count a baby's kicks and movements.

Bellybuds: This device makes it possible for an unborn baby to listen to its parents' favorite music. It aims to form a bond via speakers that safely play soothing sounds directly to the womb.

BIO bands: BIO bands help mothers with morning sickness. The adjustable wristband applies continuous acupressure to specific points at the wrist to get rid of discomfort.

Bellabeat Leaf: Worn as a kind of piece of jewelry, this device monitors sleep, tracks daily activities, measures stress levels and counts number of steps taken. The device is useful for mothers-to-be who lead an active life before pregnancy.

And here are a few apps that have become increasingly popular:

Pregnancy+: This app follows a pregnancy week by week. The app is also used by soon-to-be fathers, grandparents and other family members. The tracker includes a personal diary, doctor visit log, kick counter, pregnancy weight log and baby shopping list as well as thousands of baby names.

Mom.Life: The app is designed for tracking pregnancy as well as a baby's development. Mom.life also allows other moms to chat via the app, offering support and answering any questions they have.

SMSmame (SMStoMom): This app provides free tips and guidance from leading gynecologists, neonatal specialists, pediatricians and psychologists. The tips and guidance are consistent with pregnancy term or the baby's age.

9 mesyatsev (9 months): Especially popular in Kazakhstan, women using this app keep track of what is going on during pregnancy through a digital diary that records and remembers the story of starting a new life.

Fitness apps. As is true worldwide, there are plenty of fitness apps used across Russia, Kazakhstan and Ukraine. Here are some of the most popular ones and in which country they are gaining popularity.

Sworkit: This app is quite popular in both Russia and Ukraine. Users tell Sworkit the type of workout they want (strength, cardio, yoga or stretching) and the amount of time (anywhere from five minutes to an hour) and the app delivers moves to follow during a "sweat session."

Freeletics: This app offers a lot of features, clear and comprehensible exercise demonstration and elaborate workouts and regimens both for beginners and experienced athletes. Freeletics is popular in Russia, Kazakhstan and Ukraine.

RunKeeper: This app is very popular in Kazakhstan. Initially designed for runners, it soon outgrew its intended purpose to become a social networking platform for healthy lifestyle enthusiasts. RunKeeper has a set of features typical for such fitness trackers. A GPS sensor allows tracking runs and walks and calculates speed and distance covered.

Embrace and digitize

Russia, Kazakhstan and Ukraine are running alongside many other countries to embrace and digitize health care. In many ways, Russia is actively participating in some of the hot trends (particularly telemedicine, reviewing physicians and using digital services to monitor and improve their personal health). Kazakhstan and Ukraine use these services to some extent and to varying degrees. Russia spends more per capita on health care than Kazakhstan and Kazakhstan spends more than Ukraine.

One fundamental area that all three countries are striving to improve at a national level is the use and standardization of electronic health records. Advancements in this area will open the use of natural language processing to potentially make these respective health care systems more efficient, predictive and ready to adapt to every patient at a moment's notice.

Tatiana Barakshina is a co-founder and a managing partner of research firm Bazis, with offices in Ekaterinburg, Russia, and Naperville, Ill. She can be reached at tvb@bazisgroup.com. The author wishes to thank the Bazis health team for contributing to this piece: Dinara Akhmatdinova, Anna Shevalova, Katharina Gancarczyk, Anastasia Leonteva, Marina Petrunya and Evgeniya Zaburunova.


NEWS

••• pharmaceutical research

More similar than different

What pharma can learn from CPG

| By Bob Klein and Sid Khaitan

snapshot

The authors explain why pharma marketers should borrow a page from the CPG market research playbook.

Let's say you are a marketer and your target audience is made up of middle-class female Boomers. You would not develop a brand or consider crafting a strategy for how and when to reach these women without fully understanding their motivations, their attitudes and behaviors. But so often in the pharmaceutical industry, that's exactly what marketers do. This is particularly true on the R&D side of pharma, where getting enough qualified patients to enroll in clinical trials is the primary barrier to getting a drug to market.

What success would pharma find if it treated potential patients more like traditional consumers, taking cues from market research and brand tactics routinely used in consumer packaged goods (CPG) marketing?

As our notions of "consumer" and "patient" continue to converge into the singular "human" perspective, the inextricable links between CPG and pharma marketing can't be ignored. Disruption across the pharmaceutical sector has shifted the industry paradigm from blockbuster drugs to generic products, placing people back in the center of the equation.

Accepting that market research across CPG and pharma is indeed more similar than different opens the door to learning from the past, optimizing the present and ideating the future. When we see past the labels, we can unearth a new world of insights by confidently juxtaposing retailers to clinical trial sites, influencers to KOLs, products to medications and consumers to patients.

CPG marketers have been navigating through an era of consumerism for quite some time, building powerful capabilities for analyzing and resonating with their audiences. Market research has been embraced as a core function of the process and a closer examination reveals that many of the areas of learning are also consistent across both industry verticals. Whether you are in the business of understanding the shopper who just strolled into Whole Foods or the patient who just walked into the doctor's office, your success likely hinges on facilitating trust.

Although the tools and approaches to arrive at trust may appear dissonant between

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industries, they are fundamentally structured around delivering the right message, at the right time, to the right people and in the right place. The foundation of market research is universally built on optimizing the relevance, placement and impact of marketing strategies in order to foster enduring trust and this is as true for CPG companies as it is for pharma brands. Using market research to achieve a comprehensive understanding of what will resonate with consumers or patients – and where and when to deliver that message – enables us to position ourselves effectively in the eyes of the desired audience, from branding through creative execution.

Establish lasting trust

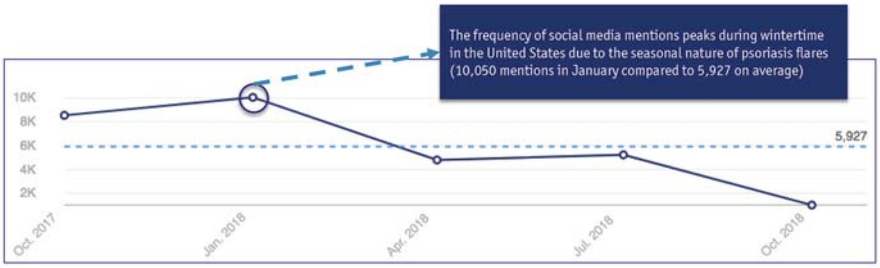
Our first and perhaps most powerful opportunity to establish lasting trust with our audience – be they shopper consumers or potential clinical trial patients – is in branding. Developing a thoughtful, well-researched brand or study architecture creates efficiencies for subsequent products or related research studies and demonstrates credibility with customers and patients.

The most widely recognized example of a brand architecture is Google, which is structured as a branded house consisting of Google Books, Groups, Videos, News, Maps, Translate and more. On the other hand, Unilever has successfully assembled an incredibly diverse house of brands that includes Dove, Lipton and Knorr. If globally revered organizations have built efficiencies through such consolidation, isn't it time for pharma to seize the opportunity?

Historically, the R&D side of pharma has maintained a single-study mind-set, tasking procurement teams with finding the best partners for individual studies in an effort to build highly tailored solutions. However, for those conducting multiple trials for the same compound or targeting specific therapeutic areas and conditions, this approach can result in operational redundancies, bottlenecks that cost time and money and, most importantly, isolated studies that leave invaluable brand equity on the table.

Enter the study architecture. By organizing studies under a universal "master brand," an agile, scalable process is established for categorizing ongoing trials, supporting new trials and improving the recruitability of patients, sites and health care professionals (HCPs).

Figure 1: Quantifying the Impact of Seasonality



Imagine a scenario where market research is conducted proactively to inform common study elements such as branding, naming, Web sites and patient/site materials. Instead of duplicating the time and efforts of creative, legal, medical and site teams across individual programs, processes become templated, streamlined and cohesive. As an additional benefit, the seemingly inevitable bottlenecks of legal reviews for trademarks and copyrights, along with regulatory approval, are consolidated, leading to fewer surprises and rapid start-up.

Nevertheless, the true impact of an insight-driven architecture is only realized during implementation. Since study elements are now being created simultaneously and backed by market research, a consistent look and feel is applied across all programs, resulting in identifiable information that resonates with patients, caregivers, HCPs and even investors. As opposed to acting as hollow vessels that simply carry names and logos, brands are transformed into value-drivers that all related studies can tap into. Uniting under a singular communication structure simplifies public relations and corporate content, which in turn materializes into future commercial opportunities with prescribers through therapeutic area dominance.

A well-crafted architecture is a dependable, tested approach that can guide all stakeholders in sorting through the clutter of options and achieving more with less. Drawing analogies between seemingly disparate industries can illuminate the path towards innovation. Expanding our minds to think from a bird's-eye view and capture best practices that are industry-agnostic provides fundamental value in discovering what works and what doesn't. As we've learned, borrowing the concept of brand architecture from the CPG marketing playbook can engender a level of trust for patients as well, ultimately translating into long-term brand equity for pharma brands.

Once a master brand is established, pharma marketers have many other opportunities to employ traditional consumer market research methods to uncover patient insights that will elevate the established brand, finding patients at the right place and time.

Can become overwhelmed

With a continuously evolving catalog of methodologies to choose from, market researchers can become overwhelmed by the prospect of defining the target in a meaningful way. However, according to Statista, among a group of 1,533 market research professionals surveyed in 2018, 60 percent used digital communities and 43 percent adopted social media analytics by the end of 2017 in order to meet their audience where they are: online.

Social intelligence falls at the intersection of digital communities and social media analytics, offering insights into human behavior as a form of observational research that takes a real-time, big data approach. Among the many merits of social intelligence is its ability to analyze trends surrounding seasons, holidays, campaigns and competitor activities, which immediately suggests applications in CPG marketing. In the world of pharma, an approach like social intelligence can help inform patient journey-mapping, which poses critical implications for protocol design, clinical trial start-up and commercial launch. For example, a patient who only deals with allergies in the sum-

Table 1

Consumer Packaged Goods	Health Care
Paths to purchase	Care pathways and treatment journeys
Decision drivers	Switching behaviors
Perceptual mapping and conjoint analysis	Competitive landscape assessment
Attitudes, awareness and usage (AAU) studies	Long-term patient perception tracking
Retail/shopper strategy	Site engagement
Influencer identification	Caregiver, KOL and HCP insights

mer wouldn't be receptive to receiving a Zyrtec commercial in the winter.

By leveraging the practice of social intelligence, we can quantify the impact of seasonality. Recently, for example, we were able to gain a big-picture understanding of how seasons affect psoriatic patients in the U.S. As you can see in Figure 1, the frequency of social media mentions peaks during the wintertime due to the intermittent nature of psoriasis flares (10,050 mentions in January compared to 5,927 on average).

Not yet captured the interest

Among more traditional consumer insights tools in CPG is syndicated research, such as GfK MRI's Survey of the American Consumer. However, the widespread benefits of syndicated studies have not yet captured the interest of health care marketers. But with broad, long-standing studies like the Survey of the American Consumer, which serve as large and updated databases for media consumption, demographics, psychographics and consumer decision-making journeys, you can often glean data surrounding drug-switching behaviors, attitudes towards health care advertising and lifestyle factors for conditions across major therapeutic areas.

For example, a quick crosstab analysis could reveal:

- – prevalence data for allergy sufferers among the general population, along with subgroups of those who have used over-the-counter medications for treatment in the past year;
- – an estimation of the addressable market for migraine sufferers who use non-prescription headache remedies and pain relievers;
- – projections of how many irritable bowel syndrome sufferers also treat constipation and diarrhea;
- – profiles of caregivers across conditions, including duties, relationships and demographic data;
- – medication adherence, frequency of HCP visits and branded vs. generic drug perceptions that can be segmented for patient populations by age, household income, ethnicity and more.

Arming teams with this information can enrich targeting and messaging for any campaign or study. By knowing the "who, where and how many" of any given patient population or HCP specialization, we can implement program tactics at key moments of aperture, reaching the right people when and where they are the most receptive.

Validated information

Although the aforementioned tools provide valuable insights and directional data prior to the launch of a study or campaign, primary research affords us the opportunity to find fact-based, validated information. As shown in Table 1, the synergies are strikingly analogous across CPG and pharma.

Whether such research is qualitative, quantitative or mixed-method, the expected outcome is the same: to arrive at human insights and inspire strategies that go beyond and deliver more.

Further, consider the value of leveraging primary research to test creative execution. Involving the consumer/patient in concept and messaging evaluation should be a no-brainer, given that they are the intended recipients for such content. Optimizing creative communications to be relevant and original to the target removes any of the guesswork. It has the potential to neutralize the whimsical dilemma famously posed by department store owner John Wanamaker: "Half the money I spend on advertising is wasted; the trouble is, I don't know which half."

By understanding that all industries and functions are engineered in the pursuit of solving human-centered problems, it becomes intuitive that "I don't know what to make for dinner" and "I'm not feeling too well" are actually grounded in the same reality.

Bob Klein is chief insights and experience officer at clinical trial enrollment company Continuum Clinical, Northbrook, Ill. He can be reached at bklein@continuumclinical.com. Sid Khaitan is an associate manager of the insights and experience group at Continuum Clinical.

••• diy research

The new hunter-gatherers of data

5 use cases driven by online DIY research tools

| By Morgan Molnar

snapshot

From Unilever to start-up BridgeCare Finance, the author cites examples of how firms of all sizes are employing DIY research for a range of data-gathering needs.

In these days of cloud software tools and lean startup methodologies, DIY market research is making an impact in more and more functions and use cases. Departments in big organizations, small teams and individual professionals who formerly had no access to the budget, time and internal resources to get market research studies done for their initiatives now see that they can become hunter-gatherers of their own data.

They can arm themselves with DIY market research software tools – online surveys and audience panels, Web site feedback mechanisms, SEO analysis suites, social listening platforms and others – and listen to real consumers, prospects, customers or employees. Without having to wait for an agency presentation, they then bring home the prey: the much sought-after actionable insights that can power their strategies and drive growth and innovation in their organization. Yes, it is a whole new world out there.

In this article I'll take a closer look at examples of how these disruptive dynamics are altering five specific market research use cases: consumer behavior, concept testing, brand research, competitive intelligence and market sizing.

We'll look at companies gigantic and tiny, e-commerce startups and CPG titans, businesses on both the East and the West Coast. By looking at real stories from the trenches, from actual companies living this revolution, I hope to illuminate how transformative this new era of DIY market research is turning out to be.

Consumer behavior

Many knowledge-industry jobs these days are based on knowing what others don't know and knowing it sooner than anyone else. Such is the case with research analysts at investment services firms, who are tasked with finding exclusive insights about the markets they cover so that they can share them with their investor clients.

Aaron Kessler, managing director and senior internet analyst at investment services firm Raymond James, studies online trends. For him it's crucial to know, for example, what social or music apps young users are downloading this month or even this week. The data points he can

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marketing.knect365.com/consumer-insights hunt down will make it into research reports that will influence investment decisions, provide credibility to the firm and establish trust with clients.

But Kessler faced a problem he hadn't been able to solve: surveying customers in a cost-efficient way. So it was extremely helpful when he discovered that he and his team could run their own consumer research without outside help and within a research budget that wasn't huge. They started using an online survey panel to target the population they needed feedback from and soon they had their own proprietary consumer insights to share with investors. "It was," Kessler says, "an invaluable tool in helping us provide unique research to buy-side clients."

These days, understanding consumer behavior can take many forms and it can appeal to many types of companies other than investment firms. DIY market research tools can help track consumer sentiment towards a brand, uncover the whys behind a product's good or bad fortunes and in general tell you where consumption is going in real time.

Key takeaway: Using DIY market research tools can be a cost-effective way to keep your finger on the pulse of consumer trends when an agency isn't an option.

Concept testing

Concept testing is another – and very popular– market research use case that benefits from a DIY approach. Used to be that only the consumer behemoths like Coca-Cola or Procter & Gamble had the resources and the time to invest in deep research into what potential new product lines might become hits once out in the market. In the last couple of decades, tech start-ups using cloud software tools showed the world the way to test all sorts of concepts quickly and affordably.

First it was software itself, as in software apps that can be quickly iterated and improved according to real-time user data. But these days you can submit even physical product ideas to quick-and-easy concept tests, for example by using video and images in an online survey or user-testing platform. You can test ideas for new offerings, specific product features, messaging claims, ad campaigns and more.

Companies of any size can increase their chances of success in the market by becoming more customer-centric thanks to DIY concept testing. That's what Helix Sleep, an e-commerce start-up from New York City, did recently. Helix Sleep competes in the crowded field of online mattress sales and its product team needs to decode very subjective sentiment data. "Sleep is so subjective," says Jerry Lin, the company's CEO. "Everyone is really unique as to what is soft or what is firm."

When a start-up like this wants to launch a second product line (pillows, in this case) it doesn't usually have the luxury of being able to commission an agency market research study. Instead, the team members roll up their sleeves and do their own quantitative and qualitative research to validate the assumptions and hypotheses they have about where their product ideas will intersect with consumer needs. Lin and his team launched online market research surveys and talked to consumers through the firm's Web site and social media presence.

These consumer feedback mechanisms led them in an unexpected direction: people wanted a pillow of varying thickness, so the company created one with inserts that can be added or removed. It also followed consumer feedback to develop a cooling cover for the pillow and to find the right price point for the finished product. Using fast, DIY market research methods, Helix Sleep was able to get to market in half the time compared to previous products, launching "the best product that we could," Lin says. "And in fact we sold out in the first month of our launch."

Key takeaway: DIY market research allows you to get frequent consumer feedback as you refine your product ideas, which can ultimately shorten your product development cycle.

Brand research

Few brands have captured the world's imagination in recent years as action camera company GoPro, a truly innovative outfit that practically invented a new consumer product category.

When a company is charting new territories like that (and growing extremely fast), one obvious challenge is that there isn't a lot of certainty about what consumers want or need – because consumers don't really know either! So obviously you engage in a dialogue with them and you listen to their answers.

Michael Zoglio, a former head of analytics at GoPro, was part of the brand's international expansion. Outside the U.S., he used online surveys and other DIY market research tools to listen to customers' views and understand the new markets where GoPro wanted to expand. International sales quickly grew as a percentage of the total based on that customer feedback data. "A lot of people go into a room and bring opinions, only a few teams come in and bring facts," Zoglio says, fully embracing the DIY spirit. "The insights we were looking to gain were not only understanding brand health but also market potential: Being able to understand opinions from people in India or China or Japan, which may be right on the cusp of becoming big markets for GoPro."

A benefit of online DIY tools is that they allow brand teams to keep a constant pulse on brand health, brand awareness, brand perceptions and more. A great example is the traditional brand-tracking study that many big companies run once or twice a year. Setting it up on an online platform that allows you to design the study, launch it and analyze the results quickly without outside help lets you increase the study's frequency for a lower cost. Goodbye, information void; hello, real-time brand health.

Key takeaway: DIY solutions allow you to tap into more markets, more frequently for the same cost as one large study with a full-service firm – a strategy especially popular when assessing international markets for expansion.

Competitive intelligence

Turmeric chai and cinnamon ice cream, anyone? With changing consumer preferences and the constant emergence of new trends, the food industry is a permanently shifting field of innovation and experimentation. That can be scary for established brands, who have more to lose than their scrappy upstart rivals.

But global giant Unilever, owner of well-established brands like Ben & Jerry's, Magnum and Breyers, decided to embrace the lean innovation spirit and launched itself into an agile market research experiment. It was the opposite of what you imagine when you think about a century-plus-old company trying to create something new.

Aware of the growing trends of ice cream with innovative flavors and healthier ingredients, Unilever tasked a five-person team with developing ideas for a new brand. According to Thomas Buckley, a *Bloomberg Businessweek* reporter, "They pitched ideas to focus groups of employees, tested names online through

SurveyMonkey and studied social media and search data with Google Analytics to find places with lots of consumers curious about digestive health."

This lean approach led the company to create a new label, Culture Republick, in less than a year to be able to compete for the minds of health-conscious consumers who previously may have been out of reach. Having paid attention to the trends taking place in its competitive field and having measured consumer preferences through its own DIY market research, the Unilever team was able to react quickly to shifting consumer taste and match it.

Key takeaway: Agile market intelligence isn't just reserved for small, scrappy start-ups. Even large companies can break away from traditional methods to innovate using DIY market research.

Market sizing

We all know the stories of huge companies that were one day born in a garage. Many entrepreneurs start out with some mixture of certainty and faith that their big idea will turn out to also be a big business opportunity. But how can you know for sure before you plunge your life savings into it or quit your job in a hurry?

Doing your own market research is one great answer. Jamee Herbert was a Seattle consultant who was getting ready to leave a stable career track to launch her own company. From her own situation and from her friends, she felt there should be a market for a financial services company focused on helping parents pay for childcare.

Before she took the final step, however, Herbert launched a market research study online. She surveyed working parents of children under 5 years old across the country and picked their brains about childcare services, career aspirations, daily needs and more. When she started receiving responses, she pretty much saw her hunch getting validated in real time. "It was my future that I was seeing coming in, essentially," she says.

Getting data from real parents helped her estimate the size of her addressable market, which was a compelling data point to show venture capital investors. "When I'm backing an entrepreneur, one of the things that I'm looking for is unique market knowledge that no one else has access to," says Zoe Schlag, managing director at Techstars Impact, an accelerator that backed Herbert's start-up, BridgeCare Finance.

Key takeaway: DIY market research is a quick way to get representative validation of an idea. If it's between going with a hunch or getting unbiased feedback, reliable data will make stakeholders much more confident in your path forward.

Weren't really possible

There you have it. These five examples, to me, are a window into trends that weren't really possible a few years back. Cloud software tools that are ever-improving and the widespread availability of technical knowledge in this information age make it almost guaranteed that these trends will keep strengthening.

DIY market research is an effective tool for today's savvy professionals and companies and anyone who's not paying attention risks forfeiting a great competitive advantage. With market research that can be fast, easy and cost-effective, who would choose not to get actionable insights every time, all the time?

Morgan Molnar is senior manager, product marketing, SurveyMonkey Audience. She can be reached at morganm@surveymonkey.com.

No longer a joke

Why researchers are embracing DIY

| By Eric Whipkey

snapshot

The advent of do-it-together has the potential to help DIY shed its pejorative connotations and offer new opportunities for vendors and client-side researchers alike.

Twenty years ago, when folks talked about DIY research, what came to mind was SurveyMonkey, which was pretty much a joke at that point. Nonetheless, both client- and supply-side researchers were threatened, especially the vendors. Client researchers felt that their internal clients would soon be fielding their own, very bad studies. Likewise, suppliers feared that clients would use the tools to do all of their own market research. Clients thought this would lead to misguided business plans and suppliers saw it as a threat to their livelihood. All of these were valid concerns and the fears were realized to some extent. But for the most part, client departments remained intact and research suppliers were not put out of business.

At that time, the marketing research ecosystem was much more insular than it is today. Research suppliers were less likely to collaborate with clients (working "for" and not "with" them), more likely to position tools and methods as proprietary and not excited about using DIY as it's being used today (largely regarding it as substandard).

Despite all of this, the market for DIY tools did grow and researchers of all stripes found value in leveraging them. As DIY research tools expanded and new players (from outside market research) entered the marketplace, innovation and the quality of the offerings were enhanced.

As often happens with open markets and disruption, DIY research became a thriving option for both client- and supply-side researchers. The combination of new software, technology and now artificial intelligence solutions has created a different world for researchers. The black box has opened and the relationship can now be described as more of an open book – more of a partnership in some cases.

This is not solely due to DIY but many factors have fed into the need and acceptance of DIY. For example:

- DIY tools, from text analytics to advanced survey fielding and analysis, are now readily available.
- Client budgets have remained restricted, necessitating creative approaches.
- Client researchers have upped their game and advanced their market research education.
- Tools are much better now.

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- Software as a service (SaaS) has made DIY much easier.
- The new players (programmers, engineers, etc.) are bringing new perspectives.

So much more than using software

At this point, DIY is so much more than using software or even a SaaS tool to field surveys. DIY can be anything from that to sample access, analytics, text analysis or even real-time AI tools. Part of the "open book" DIY world or "do it together" (DIT) world (recently coined during a DIY research conference in New York) is that research providers are now partners helping clients at various points during projects. Clients count on them to help where needed and it is DIY that helps all parties.

All researchers are now using DIY tools to some extent. When it comes to DIY, it's more than software; it's getting the work done faster and covering for lack of bandwidth. Some of what now defines DIY includes:

- the client using sample recruitment but facilitating their own qualitative research;
- the client using sample providers but fielding their own surveys;
- the client paying to fully field the survey but handling analysis on their own;
- the client using a SaaS tool to field qual or quant but getting help to leverage results for strategic marketing recommendations;
- the client leveraging their open-ended survey results and/or other unstructured data for text analytic work carried out by a research partner;
- the client leveraging a text analytic SaaS solution to analyze their own unstructured data; and
- within any of the above scenarios, the research partner is likely to be using one or more other partners and/or SaaS tools to help them efficiently assist their clients.

Those are just a few of the possibilities. The options are limited only to the tools available and the creativity of the researchers. Needless to say, this new world of DIT is bringing clients and supply-side researchers closer. We are becoming stronger allies because of DIT/DIY research and this renewed partnership is helping client-side researchers become trusted advisors within their organizations and helping suppliers' businesses thrive in the process.

Never the enemy

DIY was never the enemy and it certainly is not now. DIY research at its most basic remains a way for researchers to save time and (sometimes) money. But more importantly, with the "black box" open, we have new flexibility among client researchers for how they work with their research partners. This more-open relationship is helped by software, SaaS or AI but not completely defined by it. DIY research methods and tools are used by both clients and suppliers to reduce costs, create efficiencies and do things differently and faster but perhaps as important, they truly allow client-side and supply-side researchers to work together more closely as partners. These partnerships have transformed the supplier/client relationship from suppliers completing projects "for" clients to supporting the business together "with" them using various research efforts.

Let's look at a recent example based on my transition from a very large company with many moving parts to a much smaller, almost start-up-like non-profit. I went from working for an organization with complex politics across multiple departments (some of which included more employees than my current employer's entire payroll). At my old company, selling-in an enterprise-wide DIY tool was very difficult for many reasons, such as: security, "too many cooks" (i.e., the politics I mentioned) and, finally, the sheer difficulties of pulling in all of the enterprise parties required to get things off the ground.

At my current company, many of the same issues turn DIY into a win-win. We are already trying to get more done with less so a tool that can be shown to have utility and value across several areas – from operations to research to marketing – is an easy sell. In part because there are so few moving parts and people to complicate things, the obstacles fall away.

But what does it mean for a researcher? Well, from where I now sit, I have access to great data from a small call center that can be turned into text and used to create new theories and hypotheses to be tested. That means new studies to carry out with yet more DIY tools that my team and I can either do ourselves or farm out to other more traditional research houses. The possibilities are endless and only made possible by an initial investment in a strong DIY tool.

So we have truly gone from a black box that no one wanted to an open book that some of us cannot quite put down. Of course, working for a small non-profit also comes with limited budgets. But again, many DIY tools are designed as SaaS and come with lower price points. The goal is, after all, to allow for market researchers to "do it themselves," presumably for less money. Add to this the idea of "do it with us" along with a "trusted advisor" mentality and DIY becomes the new way of doing business rather than some new alternative to be "sold-in."

Feel pretty good

Where do we go from here? I think that if I were I working for a DIY provider, I would feel pretty good about now. Seriously, what is going to be next? Once we can leverage these tools to "read" text and discern sentiment from open-ended responses and/or phone call transcripts, what will our companies need with us? The truth is, if all that was needed was to understand the what or the when – or even the who – then we would truly be working ourselves out of jobs. But those questions are NOT enough.

To truly gain and leverage insights, companies need to understand the why behind needs, dislikes and trends. It is here that researchers will always be needed. Even so, DIY will still play an ever-present role. As the typical "why" engines like the focus group or the individual interview move online and virtual, the DIY tools will again be key. They will eventually play even more important roles as a means to better connect us to our research participants. Technology like 3-D virtual reality or holographic VR will eventually make online focus groups or in-depth interviews seem quaint. Future researchers may marvel at the days when their older colleagues had to travel from city to city over the course of several months to complete a series of groups that they could complete in one week in a holographic VR studio.

There are truly exciting and interesting times coming to research and they are not very far off. Hold on tight folks, because DIY is just getting started.

Eric Whipkey is a Washington, D.C.-area researcher. He can be reached at whipkey_eric@yahoo.com.

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Bryan Orme is president of Sawtooth Software, the leading survey provider for product optimization and idea screening (e.g., conjoint analysis, max-diff). Sawtooth Software's optimization tools can be linked with other survey platforms such as Confirmit, Qualtrics and Decipher so that respondents are passed from these survey platforms into Sawtooth Software.

Bryan joined Sawtooth Software 24 years ago and has been its president since 2006. He was the recipient of the American Marketing Association's prestigious Parlin Award in 2017 for "outstanding impact and leadership" in the market research profession. Bryan has published two books on conjoint analysis (*Getting Started with Conjoint Analysis* and *Becoming an Expert in Conjoint Analysis*) and has written over 100 white papers and articles on the subject. The Sawtooth Software workshops and conferences that Bryan organizes are widely respected and are seen as the place to go to learn about product optimization, market segmentation and survey research.

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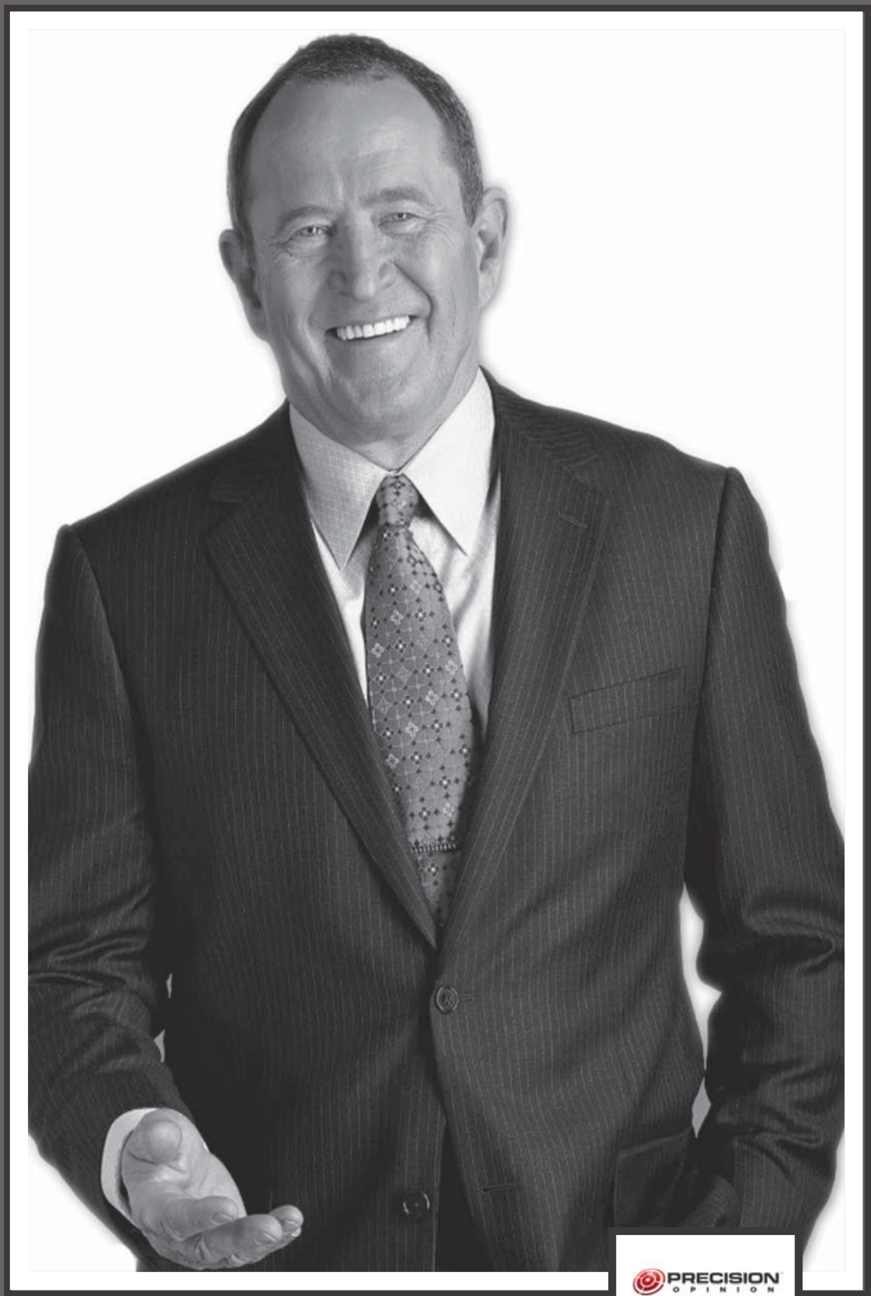

JAMES T. MEDICK
PRESIDENT, PRECISION OPINION INC.

Since 1996, James Medick has been leading the charge in quality insights data collection for phone, online and in-person market research. Medick's operation, Precision Opinion, is located in Las Vegas and is home to a 650-station CATI data collection center, an award-winning focus facility and a technology team that develops proprietary digital data collection software and tools.

Four presidential elections, five midterm elections and a 15-year contract with government services later, Precision Opinion enters 2019 with no signs of slowing down. Their mission of giving Americans a voice and collecting quality insights continues as they place a stronger foothold in their political and social science research niche.

Medick came to Las Vegas after working at Gallup and started his life as a consultant to the casino/tourism industry. While working as a consultant, Medick became increasingly agitated at the lack of quality data collection services he could utilize for his insights needs. Out of frustration of wanting something better, Precision Opinion was born. Originally, Precision Opinion was a small 15-seat CATI center that was providing research for the casinos that Medick had on his client list. But soon, as his research was providing better insights than what competitors offered, new clients began requesting the help of Precision Opinion with their needs as well. That's when the lightbulb clicked and Medick doubled-down on Precision Opinion. From there, the company has grown from a lean operation of 10 people to an organization that employs nearly 1,000 individuals and collects over 500,000 insights on an annual basis.

Most recently, Medick has started the latest arm of his market research firm, called BeforeTheVote.com, an online panel of registered voters to conduct weekly tracker studies and public opinion polls from their mobile devices.

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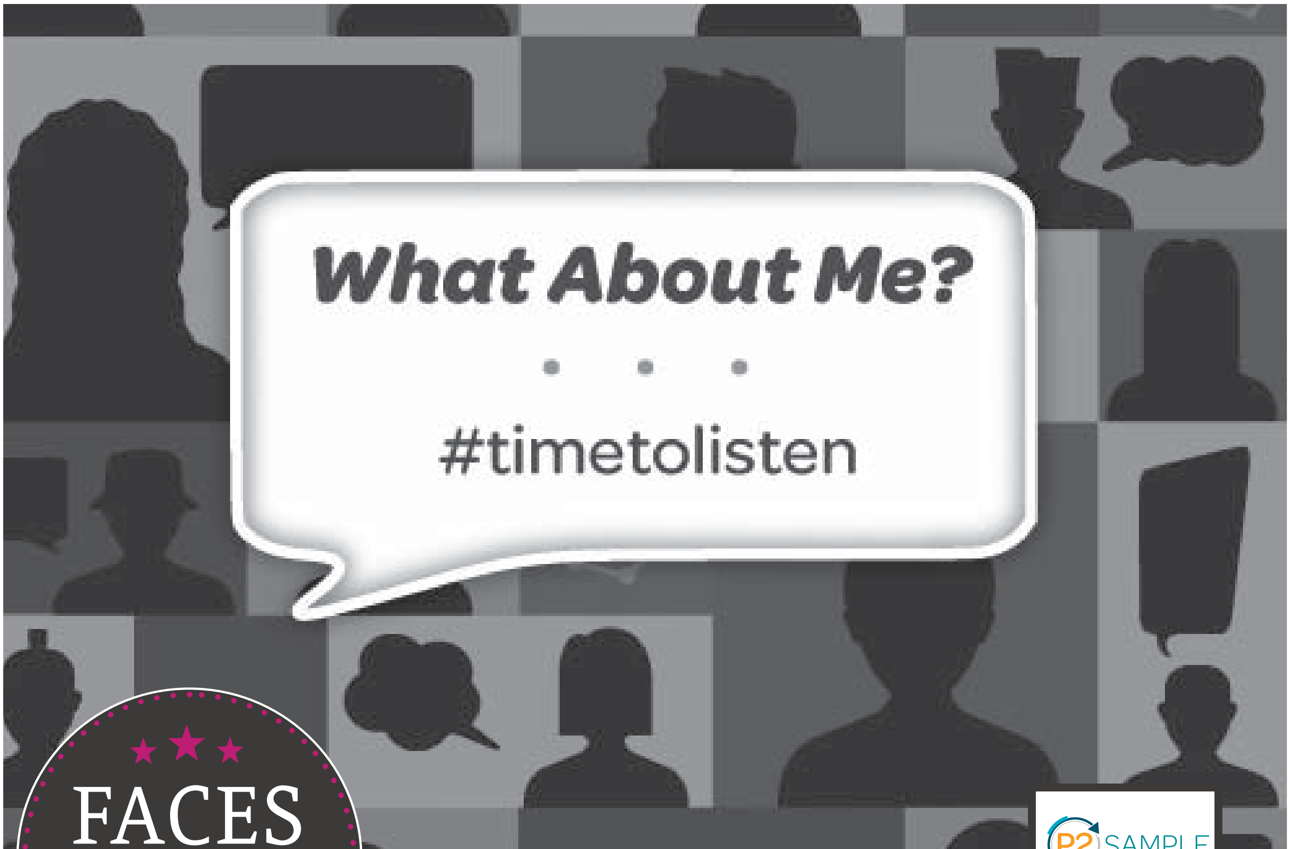

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The real face of marketing research: respondents

Data quality is an ongoing challenge in the marketing research industry and most researchers recognized that better respondent experiences can be a huge part of the solution. So why is respondent treatment still so dismal? If we're honest, these individuals should be front and center when we're talking about the "faces of marketing research." They are demanding better experiences and more control and here at P2Sample we decided to tackle this issue head on, using advanced technology coupled with the expert skills of our team members. In fact, improving the respondent experience and boosting engagement is part of our core mission at P2Sample. We use automation and artificial intelligence in order to solve many ongoing challenges in the space, including improving the respondent experience. Just a few of the steps our team has taken to put the respondent first include using technology to:

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Bringing exceptional vision to the organization

TAKAHIRO YAMAYA, PRESIDENT, RAKUTEN INSIGHT GLOBAL

With his career beginning with Rakuten Research in Tokyo more than 12 years ago, Takahiro Yamaya, also known as "Tack" to his peers, is the newly appointed president of Rakuten Insight Global.

Tack's exceptional vision for the organization is widely recognized and his focus for bringing it to fruition are the key reasons for his rise. While he firmly believes automation will be key to the business, he appreciates market research as a "people business" and to balance them both will be essential.

As the president of Rakuten Insight, he continues to ensure its panels are of the highest quality. Online research is a reliable methodology and is the bedrock of the business, enabling the company to garner client trust over the years.

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BOB MCNABB
DIRECTOR OF BUSINESS DEVELOPMENT – MARKET RESEARCH, PROTRANSLATING

Bob specializes in providing market research professionals with solutions to reach a global audience. Bob has over 25 years of experience in the industry, including language consulting, data programming and analysis, report development, project management and consultation to Fortune 100 companies. The types of research he has conducted include new product development, optimization and reformulation, branding, ATU and much more.

Over the last seven years, Bob has been assisting market research suppliers and clients with top-notch translation and customer service. Bob has been with Protranslating since 2016. Protranslating is one of the oldest and most respected language services providers in the U.S. Protranslating has been a full-service provider to some of the most respected names in the MR industry, providing services such as translations of surveys and open-end responses, in-language coding and multilingual transcription.

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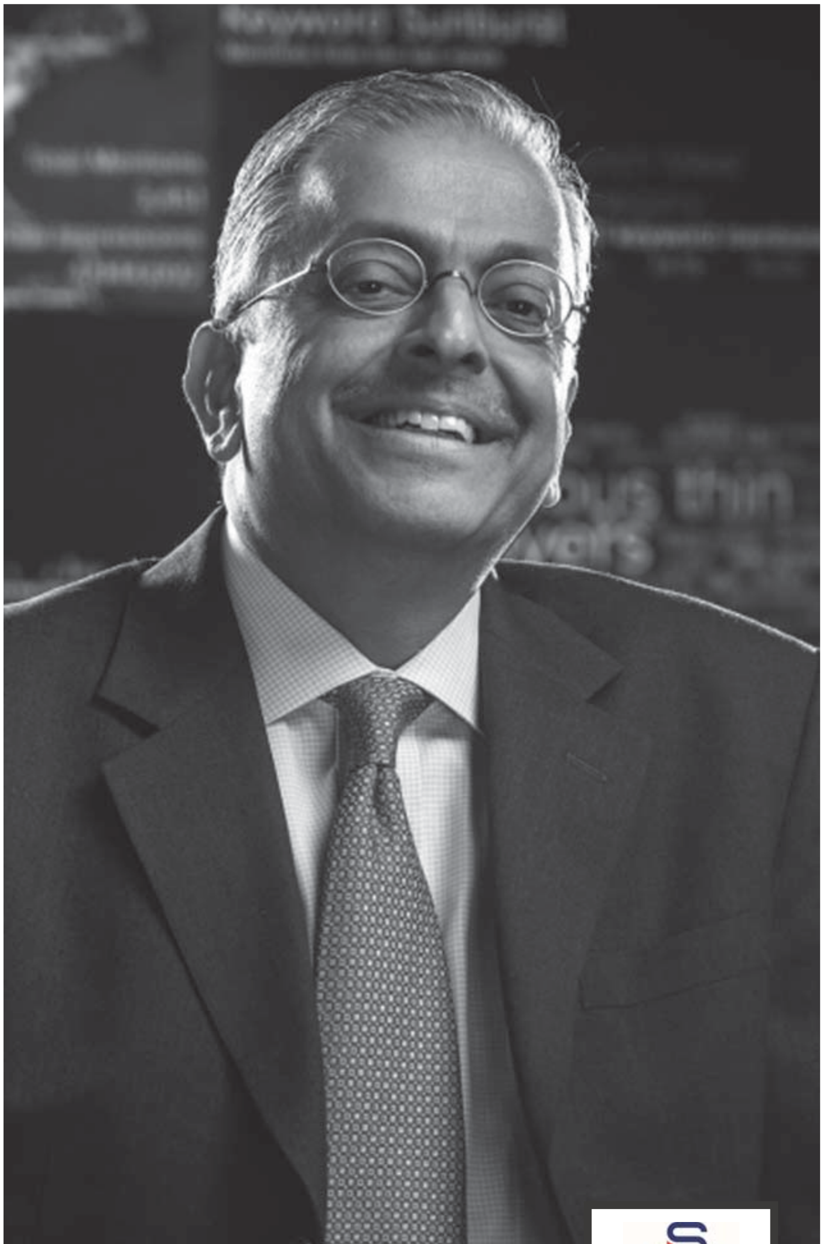

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He has authored two Amazon marketing and sales bestsellers, *Brand Rituals™: How Successful Brands Bond with Customers for Life* and *Marketing For Tomorrow, Not Yesterday: Surviving and Thriving in the Insight Economy™*.

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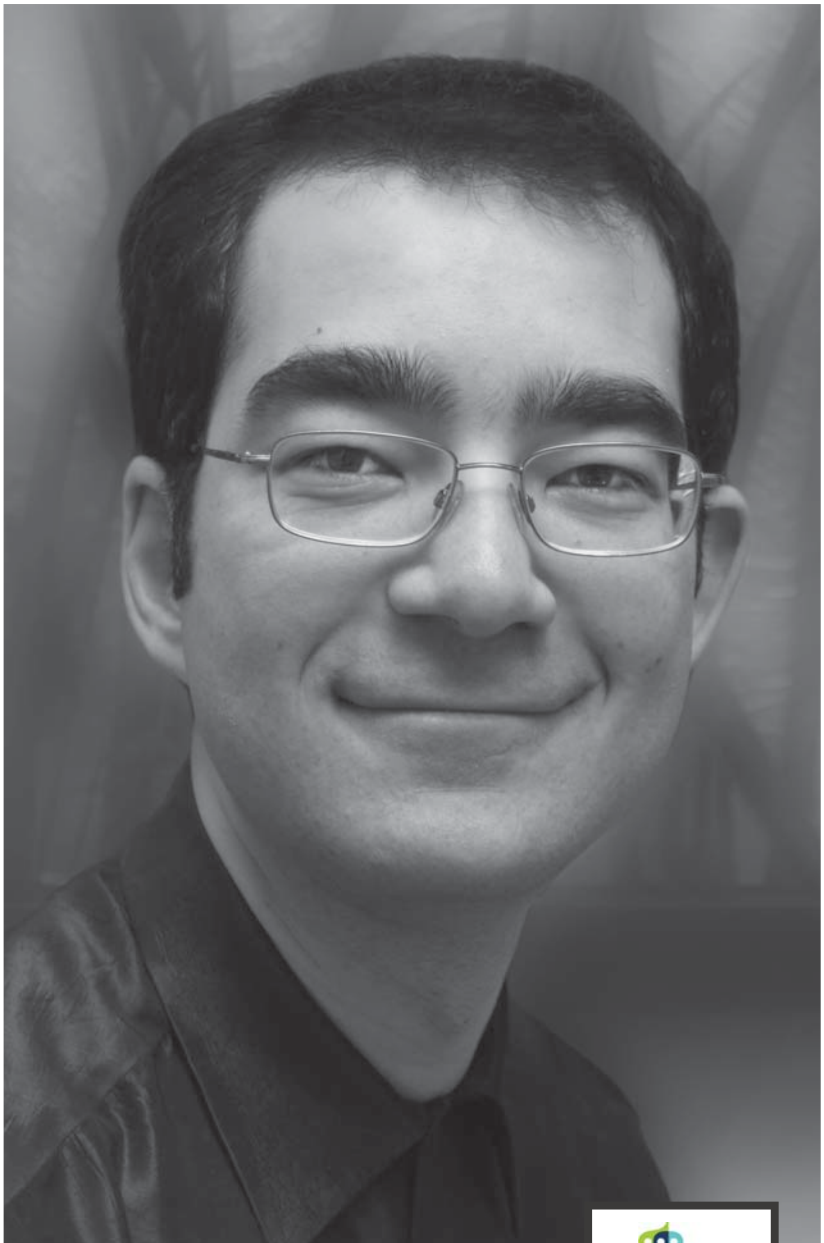

LEV MAZIN, CEO AND CO-FOUNDER, AYTM

Lev Mazin is CEO and co-founder of aytm, the leading innovator in DIY online market research. For over 17 years, Lev has applied his design/UI/UX skills building elegant, straightforward and intuitive Web and mobile user interfaces for Google, Oracle, Whole Foods, Maserati and a number of online SaaS start-ups.

At aytm, Lev is leading the company and platform's evolution, driven by design thinking, research automation, quality panel and professional services in pursuit of the best possible experience in online market research.

The aytm platform is built on empowering researchers, marketers and analysts to adopt agile innovation strategies that provide crucial insights used to validate strategic business decisions around product, brand and marketing. We believe that quick access to high-quality insights enables teams to bring products to market sooner and with fewer resources, which drives revenue and market share.

The aytm self-service user-friendly platform enables researchers to run a full range of quantitative research, collaborate in real-time on survey design and launch complex sophisticated research tests including max-diff, choice-based conjoint, pricing optimization and more. Paired with our integrated proprietary panel, which provides best-in-class levels of trust and quality, access to over 40 million consumers in 36 countries and real-time pricing with guaranteed delivery times, aytm delivers on the promise of best possible experience in automated online market research.

AYTM is a market research automation platform and the secret weapon that drives agile innovation for some of the largest consumer brands and agencies in the world. Researchers are empowered to conduct sophisticated research with a click of a button from a powerful but easy-to-use interface – cutting down the time to insights from days or weeks to hours. This researcher-powered, iterative approach to actionable insights collection improves competitiveness, speed to market and revenue.

aytm.com
415-364-8601
Lev@aytm.com

FACES of MARKETING RESEARCH

Developers of pioneering solutions

STEVE COHEN AND MARK GARRATT
CO-FOUNDERS AND PARTNERS, IN4MATION INSIGHTS

in4mation insights' vision has been to develop pioneering solutions and predictive tools that transform business decision-making — with a commitment to inquiry, innovation, integrity and impact.

We are world-class experts in using multilevel hierarchical Bayesian models to analyze both simple and complex data sets. These tools have many features that deliver deeper insights than standard statistical methods or even computationally-demanding machine learning tools. We have built our own software to estimate these models using parallel C++, which permits us to scale to tens of thousands of products, thousands of stores and geographies and hundreds of predictor variables. Co-founders and Partners Steve Cohen (seated, right) and Mark Garratt (standing) pioneered methods used today by most marketing research firms, including choice-based conjoint, latent class CBCA, computerized designs for choice tasks and maximum difference scaling. in4mation insights continues to innovate by combining practical experience with the best of academia, as our board of science advisors informs us of new developments and assists us in bringing these from the classroom to the boardroom.

Steve has over 30 years of leadership in marketing science in the U.S. and around the globe. He is the recipient of several awards; the most prestigious are the 2011 Charles Coolidge Parlin Marketing Research Award and the 2016 Buck Weaver Award given by The Institute of Marketing Science and MIT for achievement in marketing science.

Mark's career has spanned both the client-side and consulting. He pioneered the analytics function at Miller Brewing, then later went to Gillette to get them to the next level. Throughout his career, Mark has solved problems by connecting and collaborating with academics, writing papers in journals, sponsoring doctoral students and mentoring the terrific staff at i4i. He is also recognized as one of the world's leading practitioners in pricing and marketing mix.

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10 TOP INTERCEPT RESEARCH COMPANIES

Intercepts are a great way to gain face-to-face, in-the-moment consumer feedback, providing insight into real behavior.

These specialized companies can provide everything you need to help with your intercepts, including research professionals who are trained to ask the right questions to get the most valuable and accurate insights from respondents. Professional interviewers can ensure that the right consumers are targeted, providing you with the most relevant insights. Along with delivering the people to conduct interviews, these companies also offer additional assistance, whether that's by supplying software or writing the right questions to ensure both you and the respondent get the most out of the interview. Many companies offer intercepts in a variety of industries, including restaurants, retail, conferences and automotive. For your intercept research needs, consider these companies.

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Confirmit

Founded 1996
Ken Østreng, CEO

Confirmit enables organizations to build market research and customer experience programs that deliver richer insights to enable businesses to make smarter decisions. Our clients create multichannel research programs that engage customers, deliver a compelling respondent experience and provide high ROI. We work closely with insight agencies around the world, partnering with them to develop

world-class technology that supports their growth. From incredibly robust data collection to AI-driven automation to cutting-edge innovations that make research faster and more efficient than ever, we're here to support the entire research lifecycle. A partner for today, guiding your vision for tomorrow.

Phone 800-864-5266
www.confirmit.com

Creative Consumer Research

Founded 1976 | 13 full-time; 70 part-time (83) employees
Patricia Pratt, CEO

Creative Consumer Research (CCR) combines decades of market research and consumer insights expertise. We have specialization in intercepts at athletic events, festivals, malls, door-to-door low-incidence studies and transportation-oriented intercepts. We're able to find the right people to provide the right kind of insights for your research needs. If your business requires research in Spanish-speaking markets, we staff a team of experienced market researchers fluent in spoken and written English and Spanish. CCR's well-established network ensures that you receive the highest-quality customer service whether you are located in the United States or abroad. No matter the size or scope of research, we can create a custom-tailored research solution for your business.

Phone 281-240-9646
www.ccrsurveys.com

CRG Global Inc.

Founded 1987 | 200+ employees
Mary Cunningham, CEO
Paul Cunningham, President

CRG Global is a vertically integrated company that offers extensive capabilities across most research methodologies, unequaled savings and the benefit of working with one supplier for your research needs. With 18 state-of-the-art facilities and 400,000+ members in our online panel, we have remarkable access to the American consumer. Our extensive capabilities in the U.S. combined with long-term international partnerships gives us a worldwide reach. We offer advanced technologies, including eye-tracking laboratories, QualTopics IDI software and laptops/tablets for large session and off-site testing. Select facilities include sensory booths, fragrance chambers, commercial kitchens, laundry rooms, focus rooms, client rooms and more.

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www.crgglobalinc.com

Custom Intercept Solutions

Founded 2004 | 20 employees
Mike Berendes, Chief Evangelist/Director, Sales and Marketing

Custom Intercept Solutions has been the leader in on-site, face-to-face insights for nearly 20 years. CIS combines best-in-class training, central planning and analytics with continuously-vetted local research professionals across all U.S. and Canadian markets to deliver the most accurate, relevant and timely insights on the real-world customer experience. Their "sweet spot" is face-to-face intercepts in-aisle, at the table or at live events but Custom Intercept is proficient at all on-site methodologies: live observation (in-the-moment activity, menu/signage navigation); shop-alongs (delivering in-depth item/category perceptions); mystery shopping (for compliance and service measurement); and targeted live-market sample. From Fortune 100 retailers/manufacturers and industry-leading QSR/table-service restaurants to major sports franchises, event venues and theme parks, CIS allows marketers to connect directly with customers by measuring the critical moment of truth: the experience.

Phone 612-294-2032
customintercept.com

Gold Research Inc.

Founded 2006 | 50 full-time employees, 5,500+ nationwide surveyors
Nitin Sharma, CEO

Market research and insights leaders wishing to do on-site research in retail stores, restaurants, business locations, conferences and events rely on us for in-the-moment qualitative and quantitative research. With a nationwide team of 5,500+ certified surveyors, we can survey on-site in any market! We specialize in intercepting and obtaining feedback from your customers while it is still fresh (including shopping pictures/videos). Incoming results are verified in real-time via our proprietary technology and research teams for accuracy and quality. Optimum for in-store research, concept/packaging testing, satisfaction research, exit interviews, mystery shops, pricing research and store audits anywhere in the U.S. or Canada. Current clients are Walmart, Kroger, Big Lots, Conagra, Dannon, Panera and Outback.

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Phone 800-549-7170
www.goldresearchinc.com

House of Marketing Research

Founded 1976 | 22 employees
Amy Siadak, President and CEO

Welcome to intercepting – with a twist. How many more aha consumer insights could you glean about lifestyle, personal buying behaviors and brand preferences if your interviewers spoke fluent Spanish? Or Mandarin? Or Tagalog? Imagine connecting with key audience groups by relating to them in their own language – because language is a powerful bonding tool that creates a uniquely trusting rapport. Multilingual, multicultural diversity is what HMR brings to the research table. That, and our long-standing reputation for research excellence on a nationwide scale. For organizations from start-ups to Fortune 500 powerhouses, HMR creates ideal environments for game-changing qualitative and quantitative market research. Our specialty is multicultural. The advantage to you is multi-beneficial.

www.hmr-research.com
Phone 626-486-1400

KNow Research

Founded 2003 | 8 employees
Katrina Noelle, CEO

KNow Research is a full-service, female-driven qualitative insights consultancy on the front lines of research, delivering fresh insights through custom research design. Our QIIs (qualitative intercept interviews) are a quick and engaging way for fresh, authentic participants to share top-of-mind feedback on industries and brands that impact their lives in the form of a short qualitative interview. Our moderators intercept participants for conversations in-situ on products, messaging, store environments, packaging, marketing campaigns and promotional strategies as well as more open-ended explorations around any topic of interest. We conduct QIIs in retail locations or in pop-up insights booths, as a stand-alone methodology and/or for recruiting, for clients in the retail industry and beyond.

Phone 415-915-9270
www.knowresearch.com

Logit Group Inc.

Founded 1998 | 250+ employees
Sam Pisani, CEO
Aref Munshi, Vice President, Sales and Research Services

Our clients bring us projects of all types and sizes because we consistently work with them to achieve their research goals and enable them to focus on their part of the research process. We work quickly and efficiently and have quality assurance practices that exceed industry standards while maintaining a competitive pricing structure you can rely on. We believe in getting the job done right, on time and on budget. We specialize in online, phone and in-person interviewing. Some of our specialties include ethnic interviewing, B2B, international and political polling.

Phone 1-866-84-LOGIT
www.logitgroup.com

Q-insights™

Founded 1997 | 75 employees
Linda Giniewicz, Senior VP, Driven by Q-insights™
Oliver Moadel, VP, Driven by Q-insights™

Driven by Q-insights™ expertly handles automotive projects of any size. For over a decade, Q-insights has consistently demonstrated outstanding performance in the automotive research space due to their ability to recruit a wide spectrum of owners – from basic entry-level vehicles up to exotic and high-performance sports and luxury vehicles – their ability to recruit hundreds of car owners (and intenders) over a short period of time and their aptitude for gathering open and honest feedback. Offerings include car clinics, usability tests, focus groups, online research, quantitative telephone interviews, qualitative telephone interviews, quantitative telephone-to-Web interviews and ethnographic in-home research.

Phone 310-709-9031
q-insights.com/services/#automotive

Schlesinger Group

Founded 1966 | Circa 600 employees
Steve Schlesinger, CEO

Schlesinger is a leading international data collection and research services provider delivering a broad range of in-person and online solutions. We recruit for and deliver intercept data collection both where purchases are made and also anywhere else in field. Our markets include executive interviewing, medical interviewing and consumer interviewing. Our approaches include in-store tests, pen-and-paper surveys, computer/mobile/tablet/interviewing, mobile surveys and central location tests. Bilingual interviewers are available for diverse and high-quality interactions. Schlesinger Group has been managing intercept interviews for over 50 years in consumer and health care markets. Schlesinger Global Solutions supports worldwide intercept studies with one dedicated expert contact. Working in partnership with you, we provide a consultative and collaborative approach to project management and apply intelligent solutions to meet recruitment needs.

Phone 617-542-5500
schlesingergroup.com

Names of Note

■ **Marci Grebstein** has been appointed as senior vice president of marketing for *Famous Footwear*.

■ *Hunter Public Relations*, New York, has appointed **Heddy Parker DeMaria** as chief insights officer. DeMaria will be responsible for supervising a team working on consumer and market insights and program measurement across Hunter teams and clients.

■ North Reading, Mass., company *FRESH Communications* has named **Amy Sullivan** as chief marketing officer.

■ **Bhavita Trivedi** has joined consumer intelligence firm *Maru/Matchbox*'s Qualitative Center of Excellence as vice president of qualitative insights. Trivedi will be based in the firm's New York office.

■ Minneapolis-based digital marketing agency *Parqa* has hired **Jared Hummel** as chief operating officer.

■ **Fiona Blades**, founder of London-based research firm *MESH Experience*, has joined the editorial advisory board for *ESOMAR's Research World* magazine.

■ **Dave Ginsburg** has been named chief customer officer San Francisco-based insights platform *UserTesting*.

■ Encino, Calif., sampling company *InnovateMR* has added five to its survey sampling business: **Joe Regan**, **Marie O'Malley**, **Alyssa Witwer**, **Josh Mankiewicz** and **Will Luckey**. Each holds the title of director of business development.

www.quirks.comarticles/2019/20190413.aspx


Clement

■ Honeoye Falls, N.Y., consulting firm *KJT Group* has promoted **Lynn Clement** to chief research officer.

■ In Brussels, *Kantar Public*, the public policy consulting division of research company Kantar, has appointed **Roelof-Jan Molemaker** as chief executive officer Benelux

■ **Lisa Gudding** has joined research company *Ipsos* as executive vice president, focused on building new client relationships. She will be based in Minneapolis.


Bhatia

■ New York-based company *Survey-Healthcare* has appointed **Mili Bhatia** as senior vice president, project services and **Linda Nguyen** as vice president, client relationships.


Nguyen

■ Consumer intelligence platform *Frontier7*, New York, has hired **Daryl Maloney McCall** as vice president of global commercialization.

■ Irvine, Calif., mobile research company *MFour* has hired **Fang Zhang** as a senior software engineer, **Yvette Gonzalez** as director of fulfillment and **Tara Chawla** as an accounting specialist. Additionally, the firm has hired **Thomas Palompelli** as director of product marketing, **Allison Constable** as a senior solutions executive and **Natasha Tran** as a senior solutions development representative.

■ Plano, Texas, data services company *Dynata* has appointed **Dawn Hirsch** as executive vice president, human resources.

■ New York-based consumer insights platform *Perksy* has appointed **Tom Markert** as chief operating officer.


Blackler

■ Digital data collection company *Lightspeed* has promoted **Jackie Blackler** and **Simon Buckley** to co-managing directors to lead its Europe, Middle East and Africa business.


Buckley

■ Princeton, N.J., data solutions and services firm *ALC* has added **Bill Livek**, vice chairman of the board for Comscore, to its board of directors.

■ In New York, digital marketing agency *iProspect* has appointed **Doug O'Reilly** as SVP, head of data and insights.

■ Rockville, Md., research company *Westat* has appointed **Jeri Mulrow** as vice president and director of statistical sciences, leading the company's staff of statisticians. She takes over the position from **David Morganstein**.

■ Charleston, S.C., online sample and research operations company *Market Cube* has hired **Craig Dormanen** to continue to fuel its growth across North America. Additionally, **Iwan Bondarenko** has been promoted to vice president to help manage the company's data collection sales efforts.

■ *ESOMAR*, Amsterdam, has appointed **Reg Baker** as its North American regional ambassador. Baker is currently executive director at *Market Research Institute International*.

■ Encino, Calif., sampling company *InnovateMR* has made new additions to its product team**. Amanda Keller-Grill** has been appointed as VP of product strategy and **Jake Leal** has been appointed as director of platform solutions.

■ The ISA Family of Companies (which includes *ISA*, *Q-insights*, *SoapBoxSample* and *icanmakeitbetter*) has announced internal promotions and new hires from outside the research industry to focus on specific verticals. **Sally DeLuca** has been hired as account manager to help support the growth of SoapBoxSample's CANNApinion Poll, a bimonthly survey of cannabis users. **Marisa Morgan** has been hired as an account executive, while **James Gray** has been promoted to CTO of icanmakeitbetter and **Paul Dawson** will join the development team. **Rosa Gomez** has been hired as an estimating and vendor relations associate and **Kiera Sheppard** has been hired as SoapBoxSample's sales and marketing administrative assistant. **Kealan Crowley** has been promoted to account manager.

■ U.K.-based research company *Maru Group* has appointed **Julie Paul** as chief of operations.

■ *Insights Curry*, a San Francisco-based research technology company and product division of *Knowledge Excel*, has appointed **Mohit Shant** as director of innovation. The company also plans to double its employee base and add senior employees to its client services team over the next three months.

■ **Rebecca Brooks** has been named CEO of Los Angeles-based research company *Alter Agents*. Co-founders A**ngela Woo** and **Phil Dance** will be leaving the company to pursue other opportunities.

■ In London, *SurveyHealthcare* has appointed **Tamara Burke** as director, qualitative business development and **Michela Gonano** as project director, global qualitative services.


Burke

■ *Branded Research Inc.*, San Diego, has appointed **Emmanuel de Boucaud** to its board of directors.

■ London-based research company *Kantar* has appointed **Amy Cashman** and **Darren Bhattachary** as co-CEOs of its insights division. They take over responsibilities from **Will Galgey**, who was recently appointed chief operating officer of the insights division. Cashman and Bhattachary will share responsibility for day-to-day operations as well as growth and transformation of Kantar TNS and Kantar Millward Brown brands across the U.K. and Ireland. These appointments follow the recent announcements of **Mark Inskip** leading Kantar Media in the U.K. and **Craig Watkins** as chief executive of Kantar Public U.K.

■ **Steve August**, former CMO of research software company *FocusVision*, has joined the board of directors for Stamford, Conn., text analytics firm *OdinText*.

■ New Orleans-based audience platform *Lucid* has promoted the following: **Nicole Patel** to chief people officer;


Patel


Rodgers


Ellis


Hogg

Rick Rodgers to chief operations officer; **Andy Ellis** to chief revenue officer and managing director, North America; and **Ben Hogg** to managing director, international.

■ *20/20 Research*, Nashville, Tenn., has added **Christine Efken** to its insights team as a research strategist. The firm has also added **Justin Blomgren** and **Nisha Sheth** to its business development group. Blomgren holds the position of director of client engagement, while Sheth joins as a client development manager.

■ Chicago-based researcher *IRI* has appointed **Baljit Dail** as president of IRI Global. He will also join the board of directors. Dail joins the company from New Mountain Capital, a major investor in IRI. Additionally, **Piyush Chaudhari**, president of the Americas and strategy, will be leaving IRI to pursue a new opportunity.

■ **Joe Baksha**, president and CEO of Irvine, Calif., merchandising and marketing solutions firm *OSI Creative*, announced his retirement, effective March 31. He will be succeeded by **John Kellogg**, chief operating officer.

■ Media measurement company *Verto Analytics* has hired the following: **Vinayak Nair** as VP of custom research, based in Toronto; **Tony Perucca** as VP of sales, based in Seattle; **Jenni Hartwig** as VP of client services, based in San Francisco; and **Paul Stenback** as VP of finance, based in Helsinki.

■ Research and analytics company *M Science*, New York, has hired **Gerard Varjacques** as global head of sales.

■ Atlanta-based research firm *Marketing Workshop Inc.* has appointed **Rohan Ullal** as director of marketing sciences.

■ IT analyst firm *Storage Switzerland*, Fort Worth, Texas, has hired **Krista Macomber** as senior analyst.

■ **Zoe Dowling**, SVP of research at *FocusVision*, has been appointed to the board of directors for the *Market Research Institute International* (MRII). She has also joined *Women in Research's* mentoring program. In addition, her curriculum on Emerging Methods and the Future of Market Research was added to the University of Georgia Professional Courses as part of MRII Principles Express.

■ Toronto-based consumer intelligence firm *Maru/Matchbox* has appointed **Daniel Finder** as president, international. The role is in addition to his current role as Maru/Matchbox CEO of Latin America.

■ New York-based consumer data ecosystem *Veriglif* has appointed **Jonathan Ewert** to its board of directors. Ewert is CEO of *CapZone Analytics* and serves on various boards.


Yamaya

■ *Rakuten Insight Global*, a wholly-owned online market research subsidiary of Tokyo-based Internet services company Rakuten Inc., has appointed **Takahiro Yamaya** as president. Yamaya will take over for **Hidefumi Watanabe**, founder of the previous AIP Corporation. Watanabe is being promoted to a broader director role within the Rakuten Group and will continue in an advisory role within Rakuten Insight.

■ Consumer insights automation platform *Zappi* has promoted **Julio Franco** to lead its newly-formed global customer team, created to establish customer success and value generation through Zappi's platform. The customer transformation arm of the team includes **Patricia Montesdeoca**, **Tristan Findlay**, **Katie O'Connor** and **Jared Carr**.

■ U.K.-based customer data science company *dunnhumby* has appointed **Julie Woods-Moss** as chair of its board of directors.

■ *Aragon Research*, Palo Alto, Calif., has added **Betsy Burton** to its analyst team as VP research and fellow.

■ *Native*, a New York-based technology company that connects enterprises with data collectors, has appointed **Chris Incardona** as vice president for the public sector.

■ Research company *B2B International* has named **Silvia Leiva** as APAC regional insights and business growth director, based in Singapore.

■ *Branded Research Inc.*, San Diego, has appointed **Lowell Ricklefs** to its board of directors in an advisory role. Ricklefs is currently the managing partner for Traction Advising.

■ Stockholm-based technology provider *Cint* has launched its global enterprise solutions team. The team will be led by **Greg Dunbar**, EVP of enterprise. He will be joined by **Mike Misel**, SVP of enterprise for the Americas, who will lead the North American operation.

■ Rhinebeck, N.Y., company *Phoenix Marketing International* has appointed **Tamilselvan Gurusamy** as its new CTO. Gurusamy will be based in the company's Oldsmar, Fla., office.

■ Los Angeles-based research automation platform *PureSpectrum* has promoted **Travis Miller** to vice president, client success and **Andrew Alabada** to director, client success.

Research Industry News

News notes

■ The producers of **TMRE** and **The Quirk's Event** are teaming up to launch the *Insights Leadership & Talent Summit*, a closed-door, end-client/corporate researchers-only conference. The event will be held on July 15-16 in Chicago as part of the Summer Insights Fest – co-located with The Shopper Insights in Action Event and the UX Research & Insights Event.

■ **The Certification Institute for Research Quality**, an ISO audit and certification body and subsidiary of the **Insights Association**, has awarded certification to Los Angeles-based company **Acuant Inc.** for compliance to ISO 27001, which provides a framework for companies to manage their data security.

■ **Apple** has blocked **Facebook**'s Research app, which asks users to provide access to data on their phones in exchange for up to $20 per month, for violating its policies.

■ **Jeff Anderson Consulting/AH! Advertising**, a La Quinta, Calif.-based research and advertising firm, is celebrating its 32-year anniversary.

■ Des Moines, Iowa, consumer intelligence firm **Quester** has received Disability-Owned Business Enterprise (DOBE) certification from Disability:IN, a national nonprofit that helps businesses drive performance by leveraging disability inclusion in the workplace. DOBE certification requires at least 51 percent ownership by an individual with a disability.

■ Watertown, Mass., market intelligence firm **InCrowd** has answered its 2.5 millionth question posed by biotech, life sciences and medical device firms to its "Crowd" of health care professionals.

■ Plano, Texas, data services firm **Dynata** has received a U.S. patent for an automated graphing system that operates across its proprietary routing, delivery and profiling network. The graphing system ensures that accurate and relevant profile attributes, used to qualify individuals for participation in research studies, are complete and current. It also avoids the need for participants to answer long and duplicative profiling questionnaires by asking for specific information only when the required data is incomplete or has expired.

Acquisitions/transactions

■ Germany-based software company **SAP** has completed its acquisition of experience management software company **Qualtrics**. Ryan Smith will continue to lead Qualtrics, which will retain its current leadership, personnel, branding and company culture and operate as an entity within the Cloud Business Group at SAP. Qualtrics will maintain its dual headquarters in Provo, Utah, and Seattle.

■ Port Washington, N.Y., research company **The NPD Group** has signed an agreement with information services company **SportsOneSource** (SOS) to acquire assets relating to the company's SSI Data POS Sports and Outdoor tracking business. The transaction was expected to close on April 1.

■ **Brakethrough Research**, Los Angeles, has acquired eye-tracking measurement and analysis firm **Eye Faster LLC.** The acquisition will bring eye-tracking capabilities to Brakethrough Research and allow BRI to offer deeper services in eye-tracking and shopper research.

■ Anaheim, Calif., research technology company **mTAB** has acquired Switzerland-based software company **Slideworx GmbH.** Hugo Ehrnreic, Slideworx CEO, will become president Europe and global CMO of mTAB. As a combined entity, mTAB and Slideworx will introduce the next-generation mTAB platform version 10, including: mTAB Analyze, which provides data analysis, crosstabulation and visualization; and mTAB Discover, which offers self-service visual analysis and collaboration through presentations, reports and storytelling.

■ **Dentsu Aegis Network** has acquired Singapore-based digital marketing agency **Happy Marketer Group**. It will be rebranded as Happy Marketer, a Merkle Company.

■ Iselin, N.J., researcher **Schlesinger Group** has acquired **Baltimore Research**, a data collection firm in Baltimore, Md. Ted Donnelly and Heather Ashley-Collins, leading the Baltimore team, have both been appointed vice president, client solutions.

■ Plano, Texas, data services company **Dynata** has reported that its acquisition of **Reimagine Holdings Group** has received all necessary regulatory approvals and has closed. Reimagine Holdings Group and its entities included in the transaction – Critical Mix, PopResearch and MarketSight, among others – will immediately

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begin operations under the Dynata brand. Gary Laben, chief executive officer of Dynata, will lead the combined organization. Hugh Davis and Keith Price, co-founders and managing directors of Reimagine Holdings, will assume executive leadership positions at Dynata. Financial terms of the deal were not disclosed.

■ Dublin-based professional services company **Accenture** has acquired London-based innovation firm **?What If!**. The terms of the deal were not disclosed. The acquisition will further enhance Accenture's front-end innovation capabilities that help clients ideate, prototype and scale products and services for the digital economy.

■ San Mateo, Calif., survey software company **SurveyMonkey** has entered into an agreement to acquire **Usabilla**, an Amsterdam-based voice of customer technology company, for approximately $80 million. Usabilla allows companies to collect, analyze and act on real-time user feedback to improve products and customer experience. The acquisition is expected to close in Q2 2019.

Alliances/strategic partnerships

■ Iselin, N.J., research services company **Schlesinger Group** has partnered with U.K. video analytics company **Voxpopme** to provide Schlesinger OnDemand Plus, a combined solution for video insights. Schlesinger's Plus service includes access to video data, human transcription, automated video analytics, a video management platform and storage of analyzed data. Schlesinger studio recordings are uploaded directly to the Voxpopme platform within one hour of the session, allowing remote clients to stay close to the research and moderators to review sessions sooner.

■ Reston, Va., firm **Comscore** and **NBCUniversal Owned Television Stations** (NBC- and Telemundo-owned stations), a division of NBCUniversal that includes 40 television stations, have formed a multi-year partnership. All NBC- and Telemundo-owned stations will use Comscore's linear TV currency as well as its local mobile and desktop insights to enhance how the stations measure their performance. The stations will also use Comscore's automotive, political and consumer targeting segments.

■ Port Washington, N.Y., research company **The NPD Group** and the **U.S. Census Bureau** have announced an agreement where NPD will deliver regular data feeds to the Census Bureau's monthly retail programs. The agreement is meant to help retailers decrease the burden of responding to Census Bureau data requests.

■ New Orleans-based sample-buying platform **Lucid** has partnered with **Welcome Research**, a U.S.-based survey panel that specializes in reaching unacculturated Hispanic audiences. SABEResPODER (which translates to "knowledge is power"), Welcome Research's platform for the U.S. Spanish-speaking community, includes over 1 million users who will now be available on the Lucid Marketplace.

■ London-based research company **Kantar** has joined the board of **Movin' On LAB**, a sustainable mobility "think and do tank" originally founded by tire manufacturer Michelin. Kantar's automotive practice will provide consumer insight expertise to discussions and initiatives across the mobility ecosystem. Guillaume Saint, global automotive lead, will represent Kantar on the board.

■ Strategic brand consultancy **Hall & Partners** has signed a three-year partnership with research software company **Askia**. Hall & Partners has been utilizing the Askia suite since 2014, which has supported the business in gathering, processing and analyzing respondent data.

■ In New York, **CBS Corporation** has formed a strategic relationship with consumer insights platform **Canvs**. CBS will utilize Canvs Surveys to automate the coding of open-ended responses to survey questions.

■ **The Category Management Association** has entered into a joint venture with the **Category Management Knowledge Group**. Through the partnership, the organizations will provide a category management training platform and training courses for members and employees.

■ **HERE Technologies**, a mapping and location platform company, and **Blis**, a location data technology company, have formed a partnership. HERE Places, the company's database of places, will enhance Blis' points of interest database, which maps GPS data to real-world locations. The database is segmented by location categories and audiences to help brands identify and target locations of interest for media planning and buying.

Association/organization news

■ **The Insights Association**, Washington, D.C., has reported that membership has grown across all categories. The organization says year-over-year research company membership grew 45 percent, while corporate insights and analytics department membership is up 79 percent.

■ **IAB Australia**, Sydney, has launched the Future of Measurement project, which will see the IAB deliver a plan that encompasses measurement solutions, standards for ad measurement, delivery and verification as well as guidelines and best practices. The project aims to deliver data and metrics to marketers, agencies and publishers to allow them to assess opportunities and track performance. The project will be spearheaded by IAB Australia CEO Gai Le Roy and newly appointed Research Director Natalie Stanbury.

■ **The Certification Institute for Research Quality** (CIRQ), an ISO audit and certification body and subsidiary of the Insights Association, has updated and streamlined ISO 20252. ISO 20252:2019 market, opinion and social research, including insights and data analytics – vocabulary and service requirements – has officially been published. It replaces all three of the older ISO 20252, ISO 26362 and ISO 19731 standards. All CIRQ certification clients will have until December 2020 to transition to and audit under the new standard.

■ **The Insights Association**, Washington, D.C., has launched the **Canadian Advisory Council**, its ninth committee, to provide guidance on the needs of Canada-based members. The council includes: Catie Brooks, strategy and insights, McDonald's; Joseph Chen, insights lead, chocolate, North America, Mondelez; Corrin Harper, president, Insightrix Research; Isabelle Landreville, president and chief insight seeker, Sylvestre & Co.; Bernie Malinoff, president, element 54; Scott Megginson, president, insights division, Kantar Canada; Raj Manocha, chief revenue officer, Delvinia and president, Methodify; Aileen O'Doherty, head of customer insights, Home Depot; Alyssa Rodrigo, director of insights, AB InBev; Lee Vernon, manager, commercial insights and planning, Metro; and Catherine Yuile, executive vice president, insights and analytics, Edelman. Megginson will chair the council, with Rodrigo serving as vice chair.

■ **ESOMAR** has formed a strategic partnership with the **Canadian Research and Insights Council** (CRIC). As part of the partnership, CRIC will adopt a localized version of the most recent ICC/ESOMAR Code of Conduct and global standards. CRIC will also have a seat on ESOMAR's Professional Standards Committee and the support of ESOMAR's advocacy and standards teams. The two associations will establish a pathway to migrate former MRIA individual members into ESOMAR and ensure the continued value and relevance of the Certified Marketing Research Professional designation.

■ **The National Retail Federation** (NRF), Washington, D.C., has sent two letters to Congress in connection with hearings on federal privacy legislation. The NRF supports uniform federal standards that would apply to all entities that handle sensitive consumer information to avoid confusion and conflicts caused by state-level laws. The first letter was sent by NRF to the House Energy and Commerce Committee and the second letter was sent by 12 associations including NRF to both the House Energy and Commerce Committee and to the Senate Commerce, Science and Transportation Committee.

■ **The European Parliament's Legal Affairs Committee** has joined EU member states in voting on and passing a preliminary agreement on a new copyright directive that includes exemptions for text and data mining. **ESOMAR** has been working with partners in the European Alliance for Research Excellence in support of the agreement. It was originally proposed that the exemption be limited to academic institutions. The final text for the exemption requires EU member states to allow text and data mining for all research actors regardless of funding source.

Awards/rankings

■ **Kevin Ferger**, **Nicholas Pepitone** and **Kenneth De Young**, a team of three undergraduates from the College of Staten Island's School of Business, have won the inaugural **GfK NextGen Data Science Hackathon Competition**. The competition required students to develop recommendations for a hypothetical AI-based smart speaker just entering the market. Each team had five minutes to present its findings and another five minutes to field questions from a panel of judges. The winning team received $5,000.

■ **The QRCA**, St. Paul, Minn., has named the recipients of the 2019 QRCA Awards. The winners are: **Shannon Danzy**, who received the Impact Award; **Pascal Patenaude**, who received the Maryanne Pflug Award; **Mark Sumpter**, who received the President's Award; **Meagan Morgan**, who received the Qualitative Excellence ("Qually") Award; and **Kelsey Segaloff**, who received the Rising Star Award.

■ **Sarah Dinsmore**, a senior success consultant at Berlin-based market insights company **Market Logic**, has been awarded Unilever's 2018 CMI Partner Excellence Award. Dinsmore supports Unilever's PeopleWorld platform, an insights engine that's powered by Market Logic.

■ **Heather Schlesinger**, chief marketing officer of the **Atlanta Community Food Bank**, has received the Marketer for Good Award by the **Atlanta Chapter of the American Marketing Association** for her efforts in the not-for-profit arena.

New accounts/projects

■ European-based insurance start-up **VouchForMe** has selected London-based research company **Further** to conduct a research project that examines the attitudes of driving-age consumers. VouchForMe aims to use social connections among friends to reduce the costs of insurance services. The company used insights from an online community to understand the relationship between friendship, money matters and trust and how they relate to its product.

■ Marketing services company **DG Solutions** has selected Canada-based survey software solutions firm **Voxco** to provide CATI software for its new call center.

■ **Nielsen**, New York, has expanded contracted services for data insights and analytics for convenience store chain **Casey's General Stores Inc.**

With the expanded agreement, Nielsen's coverage of the convenience channel will now include census store information for all Casey's General Store locations, covering over 2,100 stores in 16 states across the Midwest and South.

■ U.K.-based agency **DJS Research Ltd** has been awarded a contract for cultural market research. The agency will conduct ongoing audience research within London, Manchester, Liverpool and St. Ives for a consortium of U.K. cultural venues over the next four years.

■ Health care services company **Cardinal Health** has selected **Nielsen**, New York, as its primary U.S. analytics provider for retail-syndicated market and panel data, supporting its network of independent retail pharmacy partners.

New companies/new divisions/ relocations/expansions

■ Panel management software solutions company **SampleNinja** has launched, led by Tariq Mirza as CEO and founder and Juha Vehnia as CTO and founder. The company will offer automatic dynamic profiling, sub-sampling from multiple sub-panels and a new sampling feasibility tool. SampleNinja is headquartered in Austin, Texas, with an office in London.

■ Research group **MIG Global**, part of Next15 communications group in London, is combining its family of specialist agencies – Morar HPI, VIGA, Charterhouse and Circle – into one to launch research company **Savanta**. Roger Perowne, global CEO and Morar HPI co-founder, will head up Savanta, supported by a senior team of Lewis Reeves, global CCO; Paul Bath, global COO; Alistair Cunningham, global CTO; Nick Baker, U.K. CEO; and Vin de Robertis, Americas CEO. Savanta will offer intelligence services including data collection and analysis, bespoke research and intelligence products.

■ **GfK MRI** and **Simmons Research** have combined to create **MRI-Simmons**, a joint venture co-owned by GfK and SymphonyAI Group, with GfK as the majority partner. Gregg Lindner, president of GfK North America, will be chairman of the new joint venture and John Ouren, Simmons chairman, will be a board member. Anna Welch, current managing director of MRI, will lead the joint venture and Mike Drankwalter will lead all sales for the new entity.

■ Pollster **Angus Reid** has formed **Angus Reid Global**, a Canada-based opinion and market research company. The company's leadership team will be headed by Ed Morawski as president and chief operating officer and will include Demetre Eliopoulos as senior vice president and managing director of the company's public affairs consultancy; Cailey Asher as senior vice president of strategy and development; and Sonia Bishop, who will head up panel operations as senior vice president of operations. The new company is centered around the Angus Reid Forum, a research panel comprised of Canadian respondents who can be reached online via text, e-mail or social media.

■ **Drive Research** in Syracuse, N.Y., has opened its brand office and focus group facility. As part of the office build-out, the company now offers a focus group facility in upstate New York. The facility includes a camera to digitally record research sessions for clients and stream sessions through a private link to off-site viewers. The focus group room includes a TV that wirelessly connects to visitor and employee laptops for screen sharing.

■ **Periscope LLC**, a Los Angeles-based research and strategy agency, has launched. The company was founded by Amy Snow, who was most recently VP of research and insights at The Wonderful Company and a former partner at Kelton Global. The company's approach is rooted in traditional research and incorporates principles from design, journalism and management consulting.

■ Rhinebeck, N.Y., research firm **Phoenix Marketing International** has opened two U.S. offices in New York and Oldsmar, Fla., as a result of the company's acquisition of Nielsen Brand Effect in early 2018. The New York office will accommodate the Brand Effect team and a number of existing Phoenix team members, while the Oldsmar, Fla., office will house the company's global data collection and technology hub.

■ Research firm **Chadwick Martin Bailey** has moved its headquarters to Boston's Financial District.

Research company earnings/ financial news

■ Stamford, Conn., research company **Gartner Inc.** reported revenues of $1.1 billion for fourth-quarter 2018 and full-year revenues of $4 billion for 2018.

■ Market and competitive intelligence company **Crayon**, Boston, raised $6 million in venture capital funding led by Bedrock Capital. The company will use the funds to double its team and support growth across engineering, sales, services and marketing.

■ London-based consumer insights platform **Zappi** announced an $8 million growth round led by investors Cipio Partners and Prime Ventures. The growth round will help the company further expand in Europe and the U.S., help expand its existing product suite and provide new solutions. Christoph Wedegaertner, a managing partner at Cipio Partners, will join the Zappi board of directors.

■ **Nielsen**, New York, reported revenues of approximately $1.7 billion for the fourth quarter of 2018, down 5.8 percent compared to the fourth quarter of 2017. Revenues for the full year decreased 0.9 percent to approximately $6.5 billion.

■ Reston, Va., firm **Comscore** reported revenue of $419.5 million for full-year 2018, an increase of 3.9 percent compared to the same time last year. Revenue for the fourth quarter of 2018 was $109.3 million, up from $102.9 million in the fourth quarter of 2017.

CALENDAR OF EVENTS

••• can't-miss activities

University of Alberta International Institute for Qualitative Methodology will hold its 2019 Qualitative Methods Conference on **May 1-3** in **Brisbane, Australia**. Visit bit.ly/2kih1qA.

IQPC will hold its Chief Data and Analytics Officer Exchange event on **May 7-8** in **Victoria, Australia**. Visit bit.ly/2QpRlWR.

Digsite will hold a Webinar titled, 'Become an Innovation Champion – Using Agile Insights for Early Concept Creation,' on **May 8 at 11:00 a.m. CT**. Visit bit.ly/2FNUcFP.

KNect365 will hold its Front End of Innovation event on **May 14-16** at the Seaport World Trade Center in **Boston**. Visit bit.ly/2hb3xdc.

SAMRA will hold its annual conference on **May 15-16** in **Johannesburg, South Africa**. Visit bit.ly/2Cm7eIv.

Merlien Institute will hold its Qual360 EU event on **May 15-16** in **Amsterdam**. Visit eu.qual360.com.

AAPOR will hold its 2019 Annual Conference on **May 16-19** at the Sheraton Centre Toronto Hotel in **Toronto**. Visit bit.ly/2ouuwVL.

Intellus Worldwide will hold its 2019 summit on **May 19-21** in **Philadelphia**. Visit bit.ly/2RDXQov.

WAPOR will hold its 2019 Annual Conference on **May 19-22** in **Toronto**. Visit bit.ly/2HRLMwc.

ESOMAR will hold its Asia Pacific 2019 event on **May 22-24** in **Macau**. Visit bit.ly/2Tuujzl.

IQPC will hold its Customer Experience Management event on **May 27-28** in **Sydney**. Visit bit.ly/2TLtRRH.

ASA will hold its Symposium on Data Science and Statistics on **May 29 - June 1** at the Hyatt Regency Bellevue in **Bellevue, Wash.** Visit bit.ly/2D3qHz0.

LIMRA will hold its 2019 Marketing Conference on **May 29-31** at the Westin Boston Waterfront in **Boston**. Visit bit.ly/2quzGSv.

Corinium Global Intelligence will hold its Chief Data Analytics Officer and Influencers, Mexico event on **May 29-30** in **Mexico City**. Visit bit.ly/2TY72t9.

ESOMAR will hold its 2019 Summer Academy on **June 3-5** in **Amsterdam**. Visit www.esomar.org.

CX Talks: The Customer Experience Summit will be held on **June 10** in **Dallas**. Visit cxtalks.org.

Insights Association will hold its NEXT 2019 event on **June 13-14** in **Chicago**. Visit bit.ly/2FbYfKF.

KNect365 will hold its Front End of Innovation Europe event on **June 16-19** in **Florence, Italy**. Visit bit.ly/2q2sVWR.

Merlien Institute will hold its MRMW EU event on **June 17-19** in **Amsterdam**. Visit eu.mrmw.net.

IQPC will hold its Customer Contact Week event on **June 24-28** in **Las Vegas**. Visit bit.ly/2HzqyGP.

UXPA will hold its International Conference on **June 25-27** in **Scottsdale, Ariz.** Visit uxpa2019.org.

featured

The producers of **TMRE** and **Quirk's Media** will hold the Insights Leadership and Talent Summit for end-client insights leaders on **July 15-16** at the Radisson Blu Aqua in **Chicago**. Visit bit.ly/2ggsCpT.

Royal Statistical Society will hold its 2019 Annual Conference on **September 2-5** in **Belfast, Northern Ireland**. Visit bit.ly/2Qmhaaa.

ESOMAR will hold its 2019 Congress on **September 8-11** in **Edinburgh, Scotland**. Visit www.esomar.org.

2019 Pharma CI Conference and Exhibition USA event will be held on **September 18-19** in **Newark, N.J.** Visit bit.ly/29Igdaa.

Merlien Institute will hold its Qual360 APAC event on **October 16-17** in **Singapore**. Visit apac.qual360.com.

CX Talks: The Customer Experience Summit Atlanta 2019 will be held on **October 21** at the Sandy Springs Performing Arts Center in **Sandy Springs, Ga.** Visit cxtalks.org.

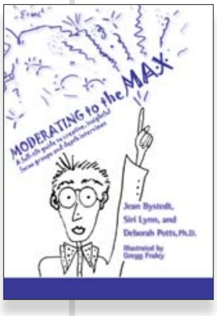
NMSBA will hold its Shopper Brain Conference on **October 30 - November 1** in **Amsterdam**. Visit bit.ly/2vvGfUL.

KNect365 will hold The Market Research Event (TMRE) on **November 5-7** at The Mirage in **Las Vegas**. Visit bit.ly/2dp2JxE.

NMSBA will hold its Shopper Brain Conference on **November 19-21** in **New York**. Visit bit.ly/2gGCVAZ.

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

ESSENTIAL READING FOR RESEARCH PROFESSIONALS



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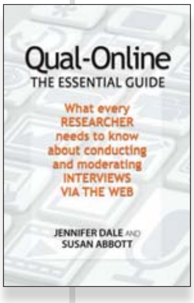
Detailed instructions for more than 20 techniques that will deepen focus group findings and bring life to a fading group. From perceptual mapping to personification, you will never again have to guess whether a technique is the right one for the occasion. Full of examples and illustrations, the book's emphasis is on "play": how fun exercises can inspire focus group respondents to reveal deeper motivations.

160 pages, 7x10, 978-0-9830436-2-1 $34.95 paper



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What Every Researcher Needs to Know about Conducting and Moderating Interviews via the Web

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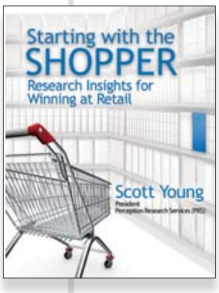

Starting with the Shopper

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Actionable insights, case studies and "lessons learned" from thousands of studies conducted by Perception Research Services, a global leader in packaging and shopper marketing research. What works in store, in home and online, and how best to apply shopper research to drive and measure success.

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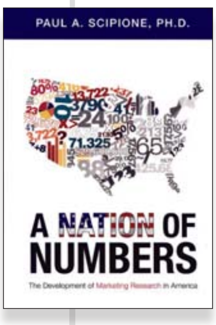


A Nation of Numbers

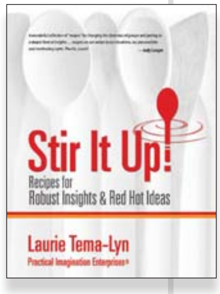
The Development of Marketing Research in America

Paul Scipione identifies the factors and events that came together to make America the birthplace of marketing research and documents how far the marketing research industry has come in its first 100 years, morphed from analog to digital, with new tools in big data and advanced analytics, observation of actual consumer behavior via scanning UPC codes, and advances in the neurosciences, and speculates where the industry will be in the future.

546 pages, 7x10, 978-0-9852482-2-2 $49.95 cloth

Stir It Up!

Recipes for Robust Insights & Red Hot Ideas

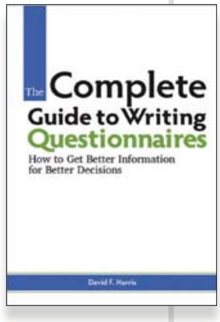


From time to time, every moderator, meeting chairman, or in-depth interviewer needs fresh ideas to jazz up a tired group or reenergize a flagging meeting. Here are 50 fresh ideas for exercises in an easy-to-use cookbook format. Organized by category, from Ice Breakers to Idea Developers each "recipe" (exercise) is presented with a brief description, an estimation of time required, a list of materials needed, instructions for how to do it, and useful tips.

140 pages, 7x9, 978-0-9830436-3-8 $24.95 paper

The Complete Guide to Writing Questionnaires

How to Get Better Information for Better Decisions

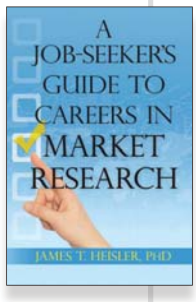


A comprehensive framework for creating questionnaires from planning research to support decision-making, conducting qualitative research, and planning the questionnaire before you begin writing questions, with guidelines to make questions clear, answerable, easy, and unbiased for the three most common tasks researchers ask respondents, and how to properly pretest a questionnaire.

220 pages, 7x10, 978-0615917672 $54.00 paper

A Job-Seeker's Guide to Careers in Market Research

How to Decide if a Career in Market Research is Right for You



An authoritative guide to the market research industry at the beginning of the 21st century, its size and scope, what value it provides, who works in the field, who uses it and for what decisions, the market research process, common methodologies, growth prospects for the industry, and more. The book explores market research as a career choice—skills, education, and training; how to get that first job, moving upward, potential earning power, success profiles, and stepping stones to related careers.

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10 minutes with...

Nina Guest

Manager, Consumer Insights, Olive Garden

"I feel like the targeting technology has gotten to the place where reaching broader populations is now more feasible."

How does your love of cooking shows like the *Great British Baking Show* influence your work in consumer insights?

I will admit, I watch many different types of food shows not just baking ones, though the *Great British Baking Show* is my favorite. I also love *Top Chef*, *No Reservations* and *The Final Table*. I feel like watching these shows is a way to explore the world through how people cook and what they like to eat. Since I have the privilege of providing insights in the food industry, it is a great way for me to stay grounded in what people find comforting to eat, which evolves over time – and in contrast, which foods are new or innovative. Now that cooking shows are more mainstream, they can influence what foods emerge for the consumer as well. While indulging my passion for cooking and food I am also increasing my awareness of food trends so I can share with others.

What new methodology do you see yourself leveraging in the next year?

Though not new to the space, I am interested in real-time surveying via mobile. I feel like the targeting technology has gotten to the place where reaching broader populations is now more feasible. The prospect of getting nearly immediate answers to polls and targeting consumers as they are actively engaging with the brand has great potential to augment other methods.

Of all the market segments you've researched throughout your career, is there one that seems more open to participating in the research process than others?

Generally speaking, I find moms of school-age kids to be the most open to giving their opinions to brands. As a mom, I am encouraged that parenting is a much more open topic these days. From blogs that give great tips on parenting hacks and lifestyle advice to honest conversations on social media about parenting challenges and solutions, moms often share to help others. Communicating with brands is part of this paradigm. This group is actively participating to share their thoughts and experiences to shape brand strategies that fit their needs.

What excites you about coming to work each day?

Every day is an adventure and an opportunity to make an impact. It is exciting that every day is different, based on the current topics at hand and methodologies being utilized. Finding the best way to answer a question is always a great challenge, especially given all of the new tools in research. In addition, I believe that consumer insights is in a unique position to enable the voice of the consumer to be amplified and incorporated into business decisions in a very real way. My work is always meaningful and has a direct correlation to the bottom line. Given one of my passions is cooking, working at a restaurant company and with food is enjoyable for me.

Read the full interview at www.quirks.com/articles/2019/20190422.aspx.